



AB SIĞIR VE DANA ETİ PAZAR DURUMU

18 Haziran 2020



European
Commission

BAŞ

HEADS

Jan-Mar 20/19

EU

EU + UK

BOĞA

Bull

+1.6%

+1.5%

ÖKÜZ

Bullock

+6.0%

+4.2%

İNEK

Cow

-0.4%

-0.4%

DÜVE

Heifer

+3.1%

+3.6%

BUZAĞI

Calve

-1.6%

-2.3%

GENÇ
SİĞİR

Young cattle

-0.2%

+0.1%

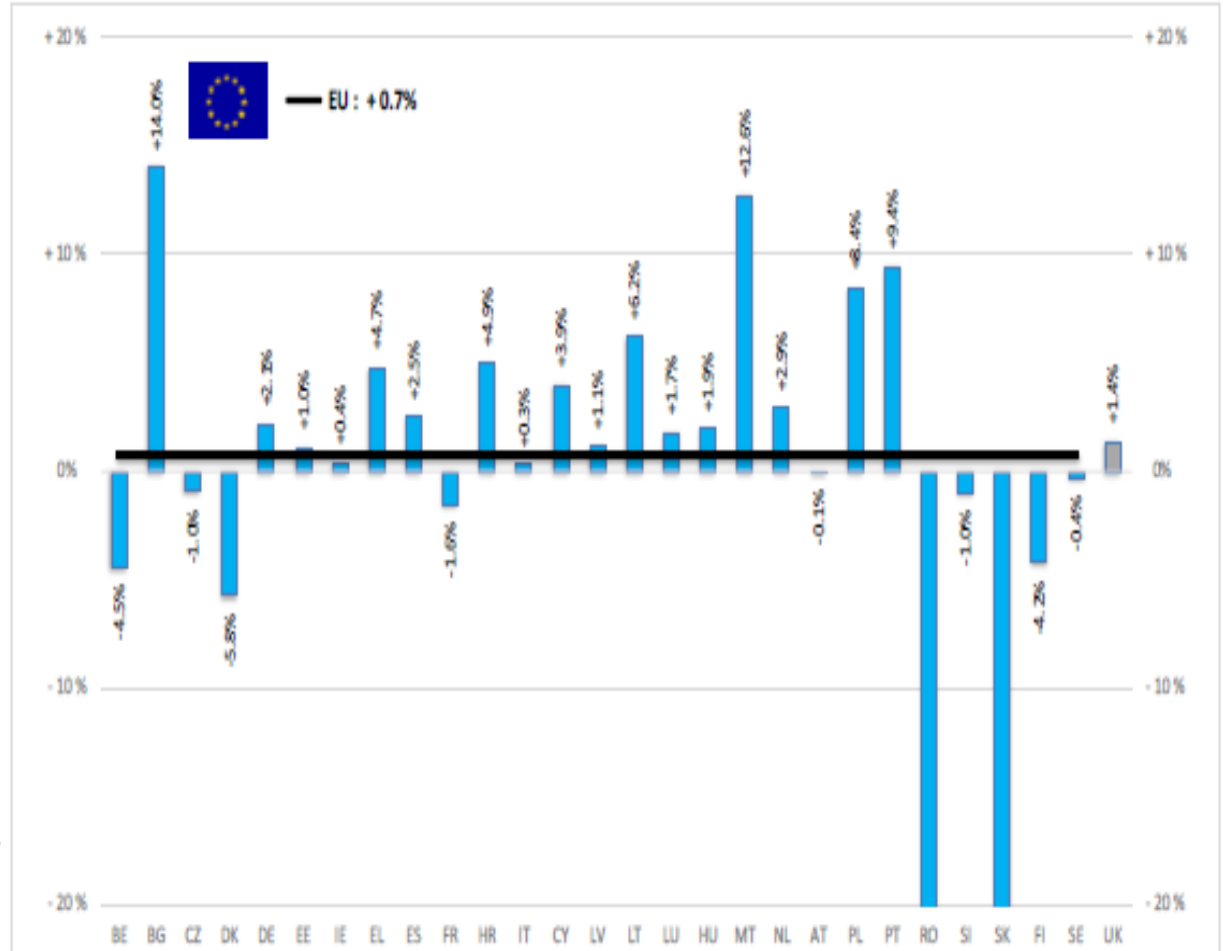
Büyükbaş
Hayvan
Eti

Meat of
bovine
animals

+0.7%

+0.8%

Estimates for last month of period :



Source : EStat - Newcronos



European
Commission

TON

TONNES	Jan-Mar 2019	
	EU	EU + UK

BOĞA

Bull	+1.2%	+1.2%
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ÖKÜZ

Bullock	+7.6%	+5.2%
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İNEK

Cow	-1.3%	-1.2%
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DÜVE

Heifer	+0.2%	+1.6%
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BUZAĞI

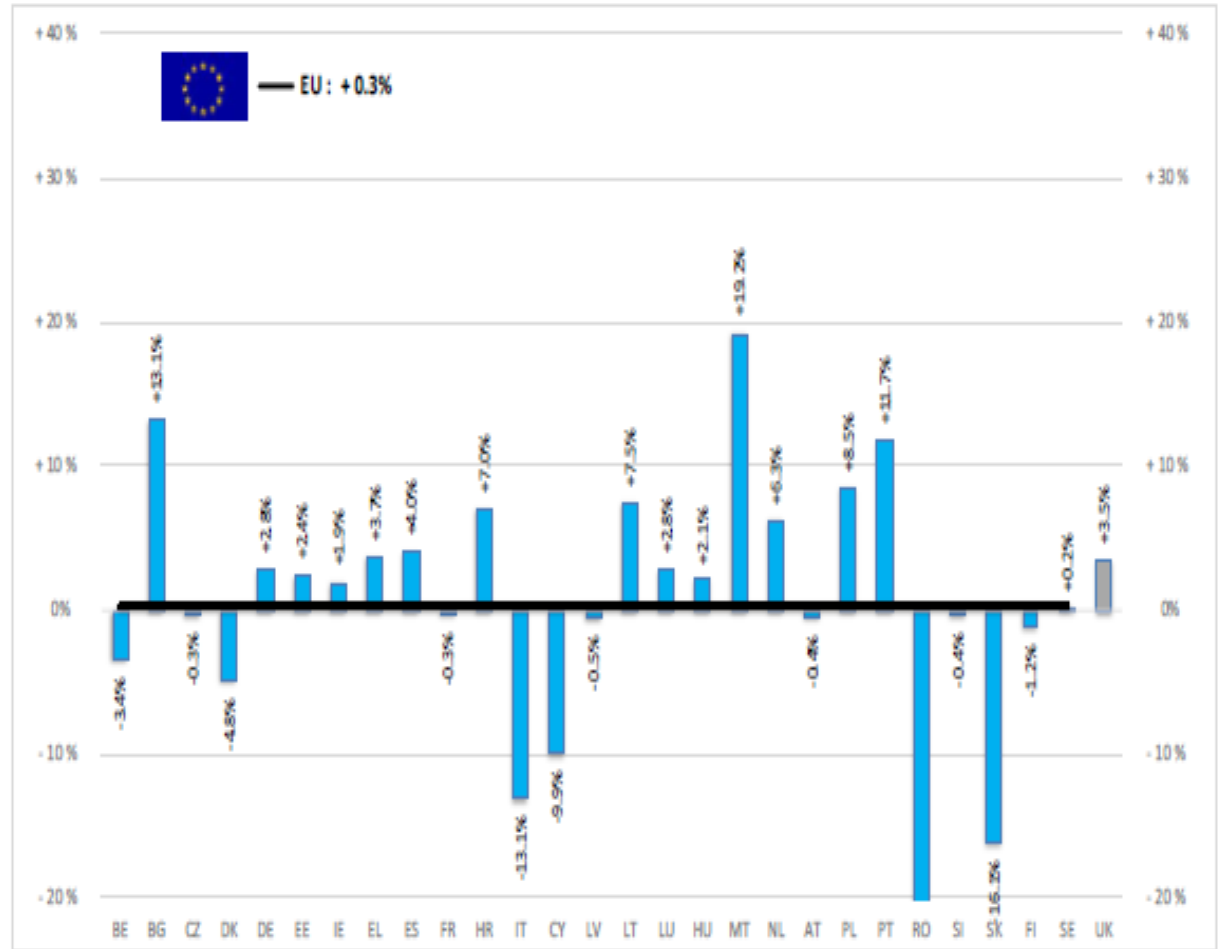
Calve	-3.6%	-3.7%
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GENÇ
SIĞIR

Young cattle	+3.7%	+4.0%
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Meat of bovine animals	+0.3%	+0.7%
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Estimates for last month of period :



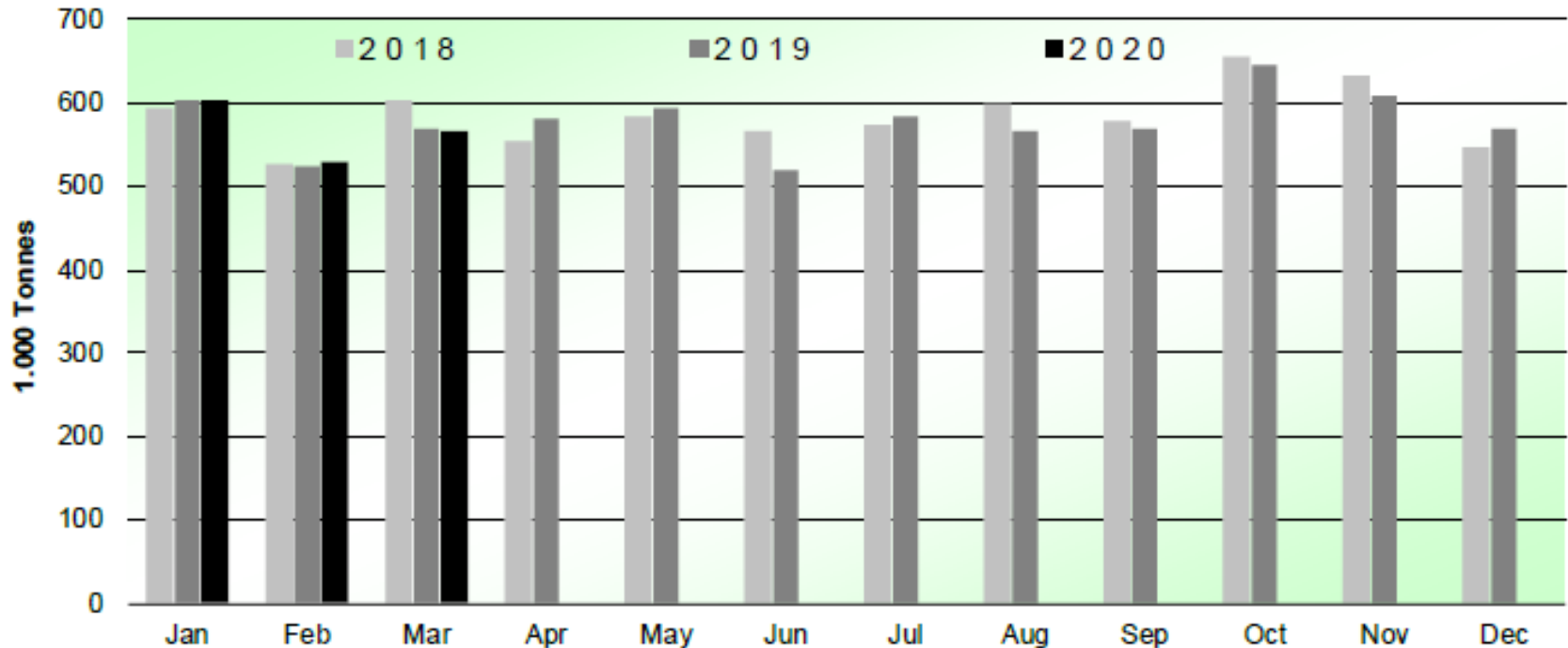
Source : EStat - Newcronos

Büyükbaş
Hayvan Eti



SIĞIR VE DANA ETİ ÜRETİMİ (AB Kesimler – Ton)

Beef & Veal Production (EU Slaughtering) - Tonnes



Source : EStat-Newcronos



EU Prices week		24	Evolution since last week	Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z-R3	357.8	+ 1.6%	+ 3.3%	- 1.1%
	Young Bovines (Z)	390.1	+ 12.5%	+ 12.8%	+ 12.5%
	Young Bulls (A)	347.6	- 0.8%	+ 1.0%	- 2.0%
	Steers (C)	364.6	- 0.0%	+ 2.0%	- 5.1%
	Cows (D)	272.6	+ 1.5%	+ 6.1%	- 7.4%
	Heifers (E)	363.0	+ 0.3%	+ 2.7%	- 3.2%
Live Animals	Male Calves Dairy Type	79.13	+ 6.5%	+ 15.3%	- 35.6%
	Male Calves Beef Type	202.2	+ 4.0%	+ 12.3%	- 14.2%
	Young Store Cattle	2.43	- 0.1%	+ 0.4%	+ 0.9%
	Yearling Male Store Cattle	2.29	- 0.6%	- 1.9%	- 3.1%
	Yearling Female Store Cattle	2.34	- 0.9%	- 1.3%	- 4.1%
	Calves slaughtered <3M	414.4	+ 1.9%	- 1.2%	- 8.6%

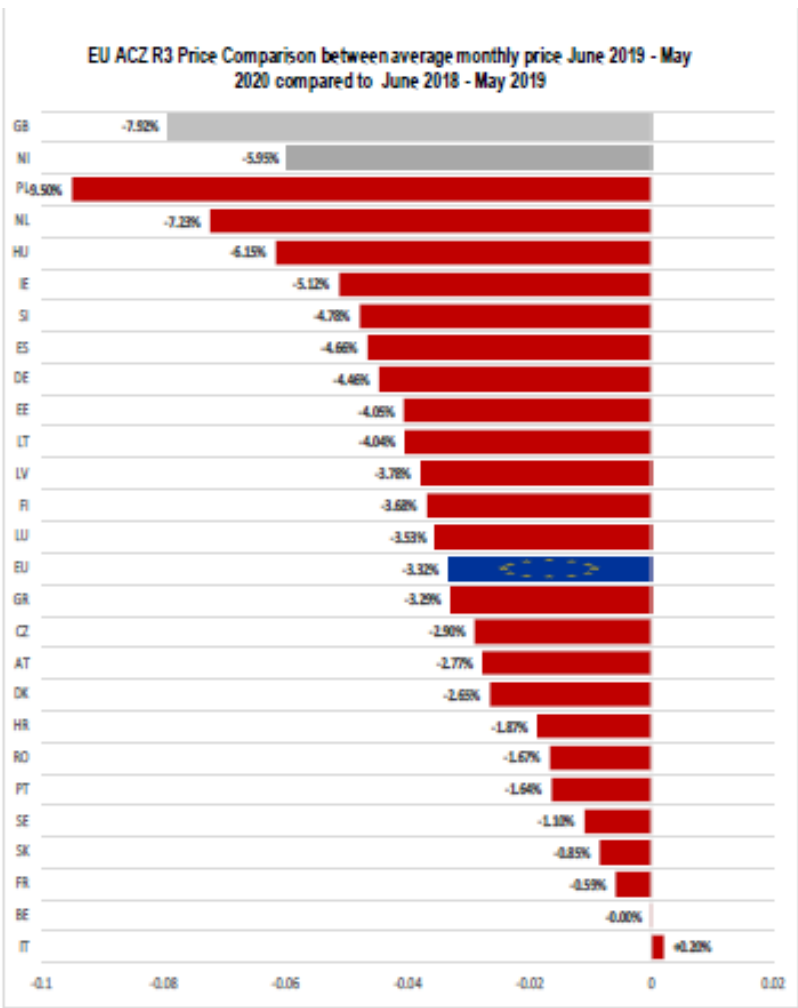
Sources : MSs notifications (Regulation (EU) 1182/2017 and 1184/2017

KARKAS FİYATLARI

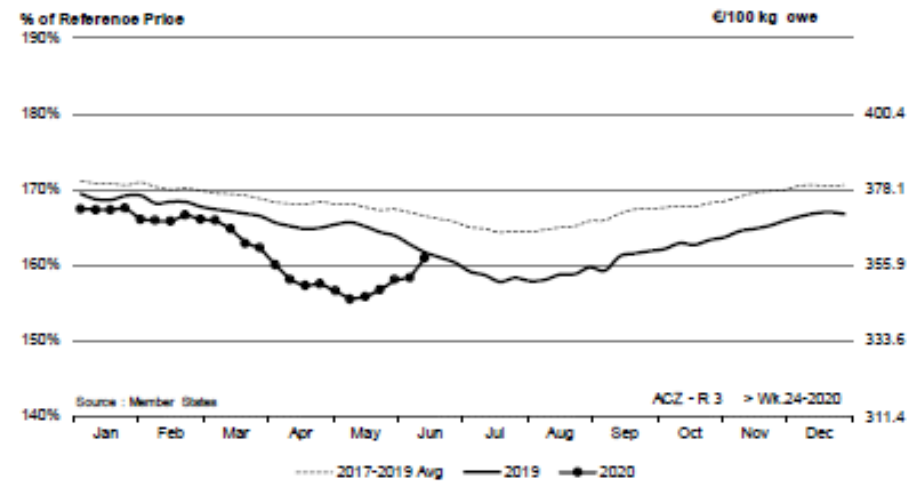
AB DEĞİŞİM A/C/Z. R3



European Commission



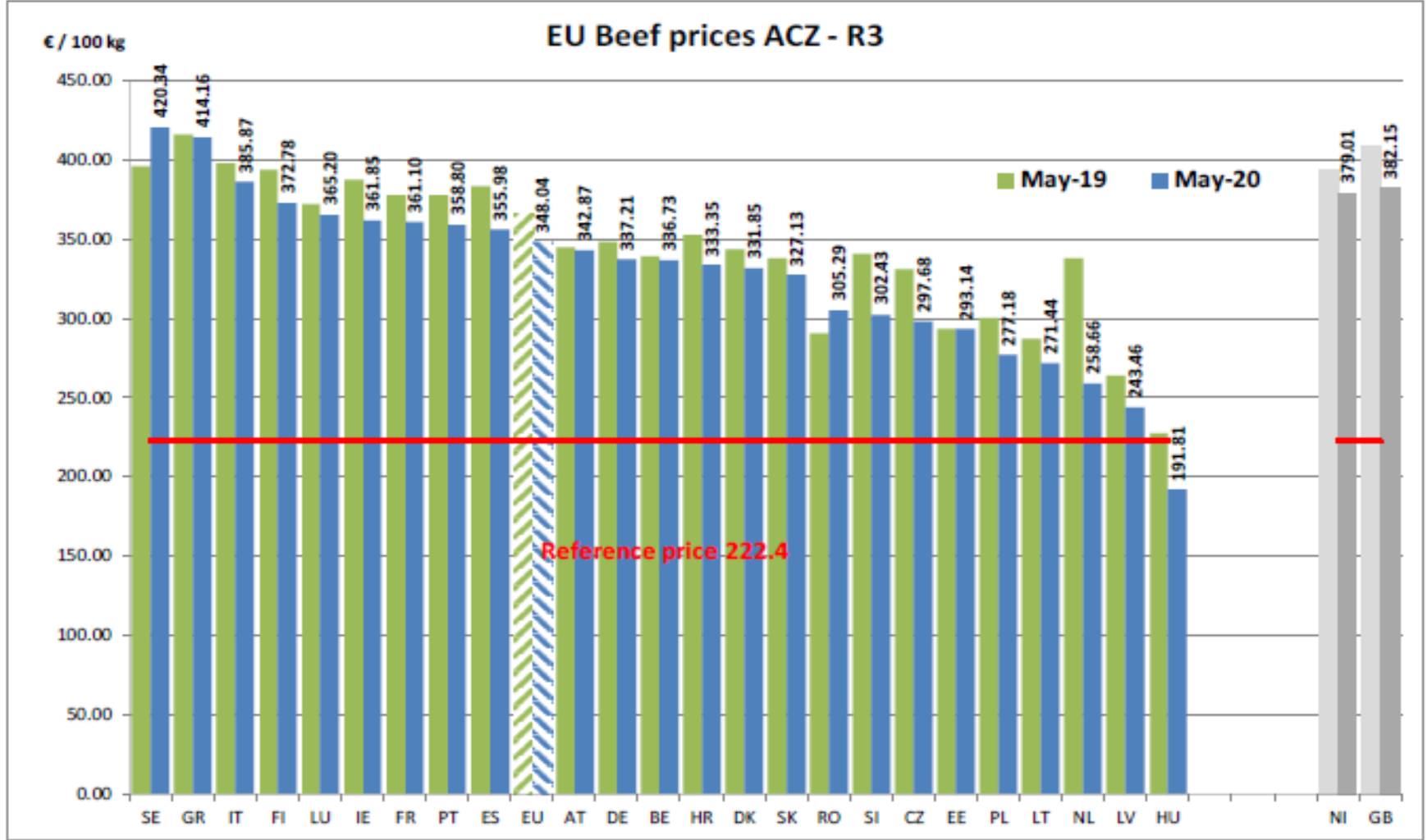
ACZ - R 3 > Wk.24-2020



Price in week 24 :	357.85	Average price in May 2020 :	348.04
% change y/y :	- 0.5%	% change y/y :	- 5.1%
% Ref. Price in wk 24 :	160.9%		

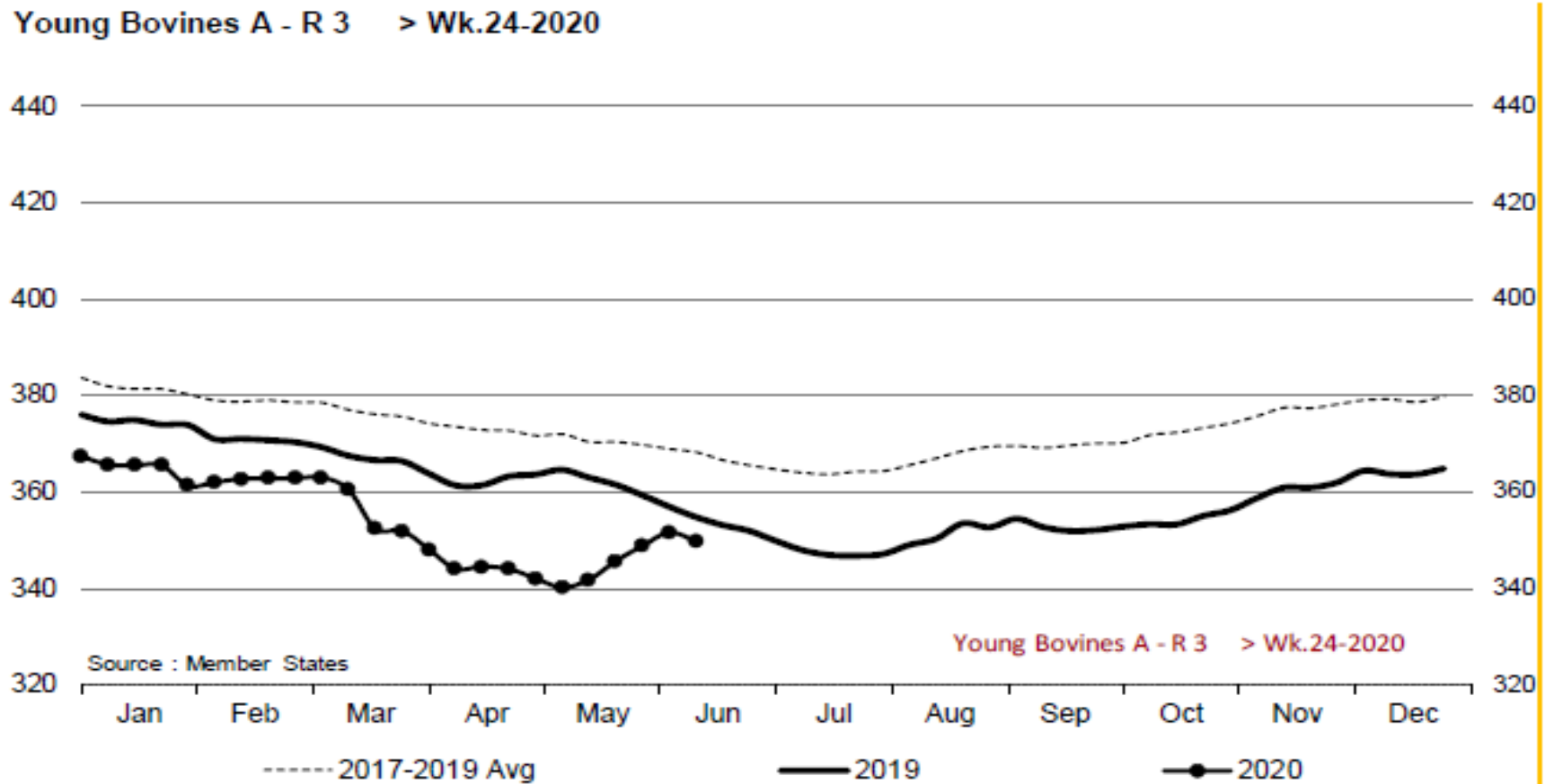
KARKAS FİYATLARI

AB DEĞİŞİM
A/C/Z. R3





Young Bovines A - R 3 > Wk.24-2020

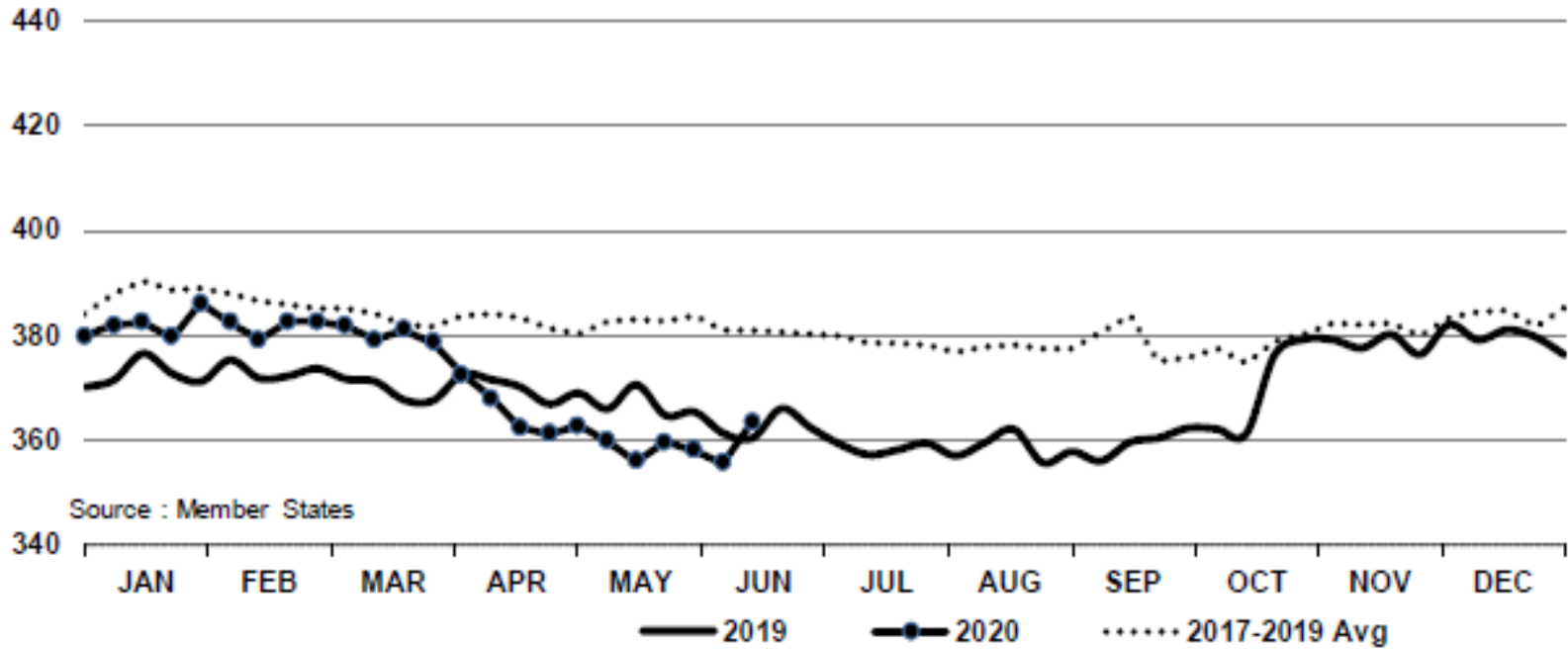


Price in week 24 : 349.59
% change y/y : - 1.5%

Average price in May 2020 : 343.89
% change y/y : - 5.2%

In € / 100 kg

Young Bovines 8-12m Z - R 3 > Wk.24-2020



Price in week 24 : 363.50
% change y/y : + 0.8%

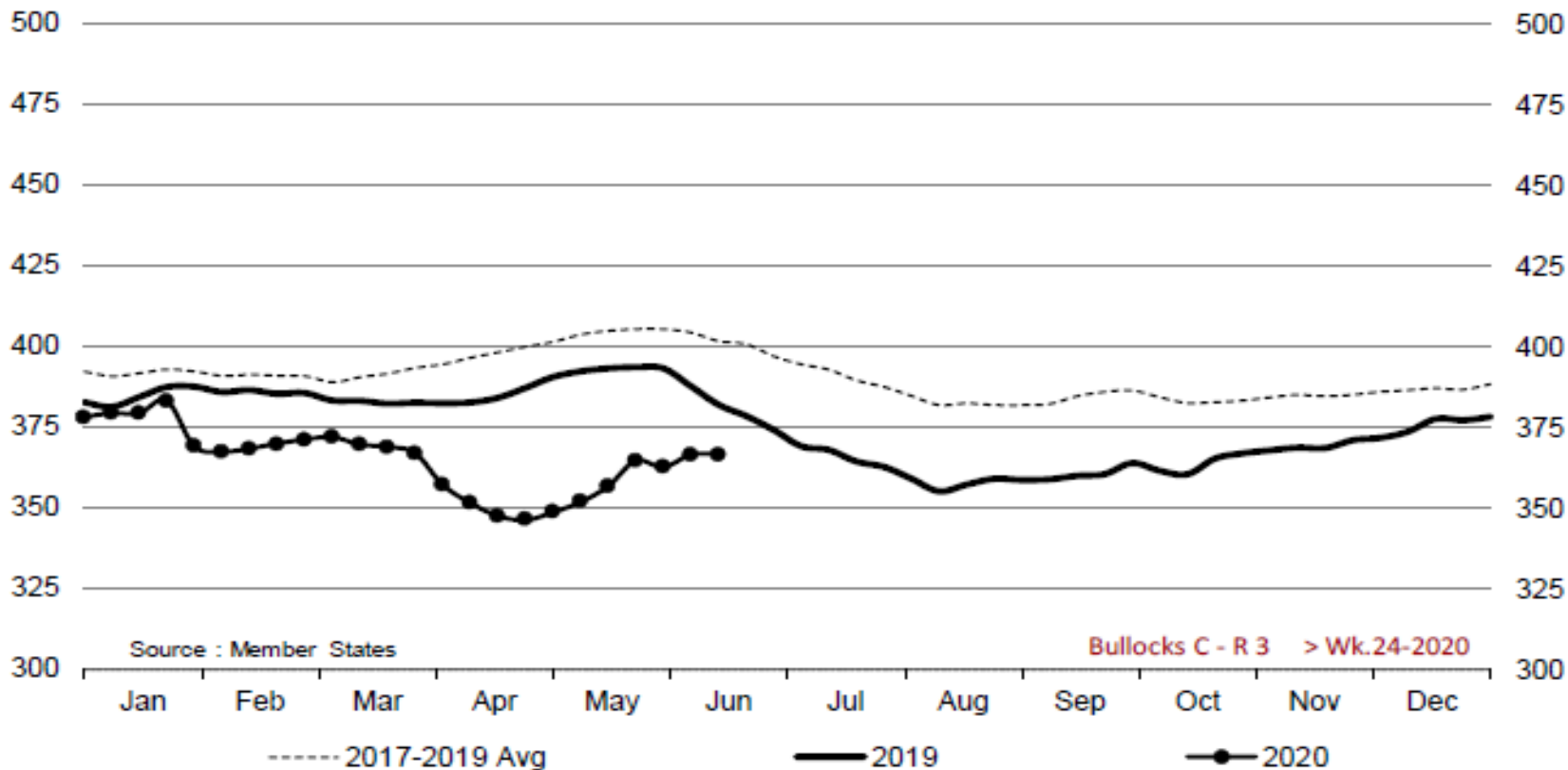
13/05/2020

Average price in May 2020 : 358.79
% change y/y : - 2.3%



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Bullocks C - R 3 > Wk.24-2020

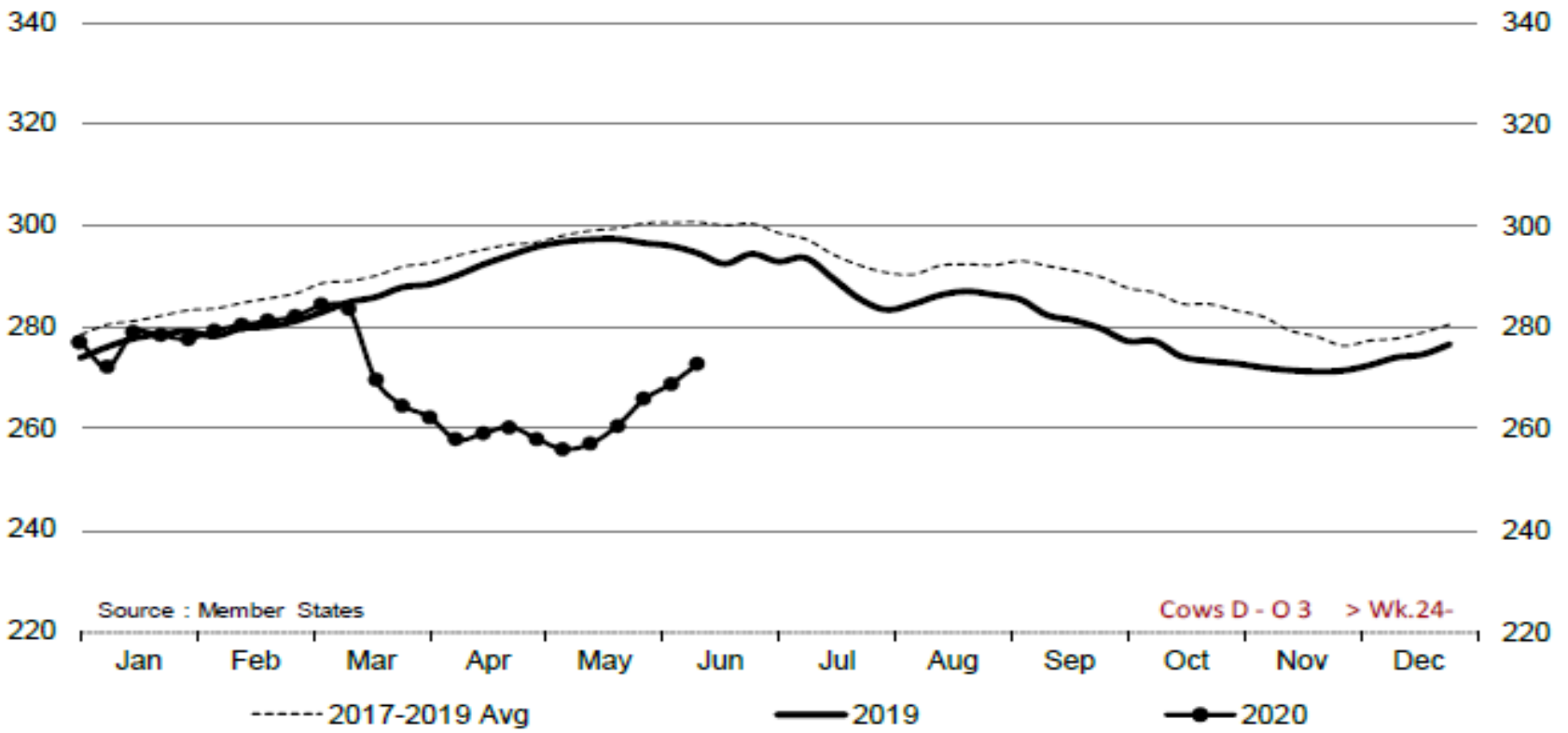


Price in week 24 : 366.74
% change y/y : - 4.0%

Average price in May 2020 : 358.07
% change y/y : - 8.8%



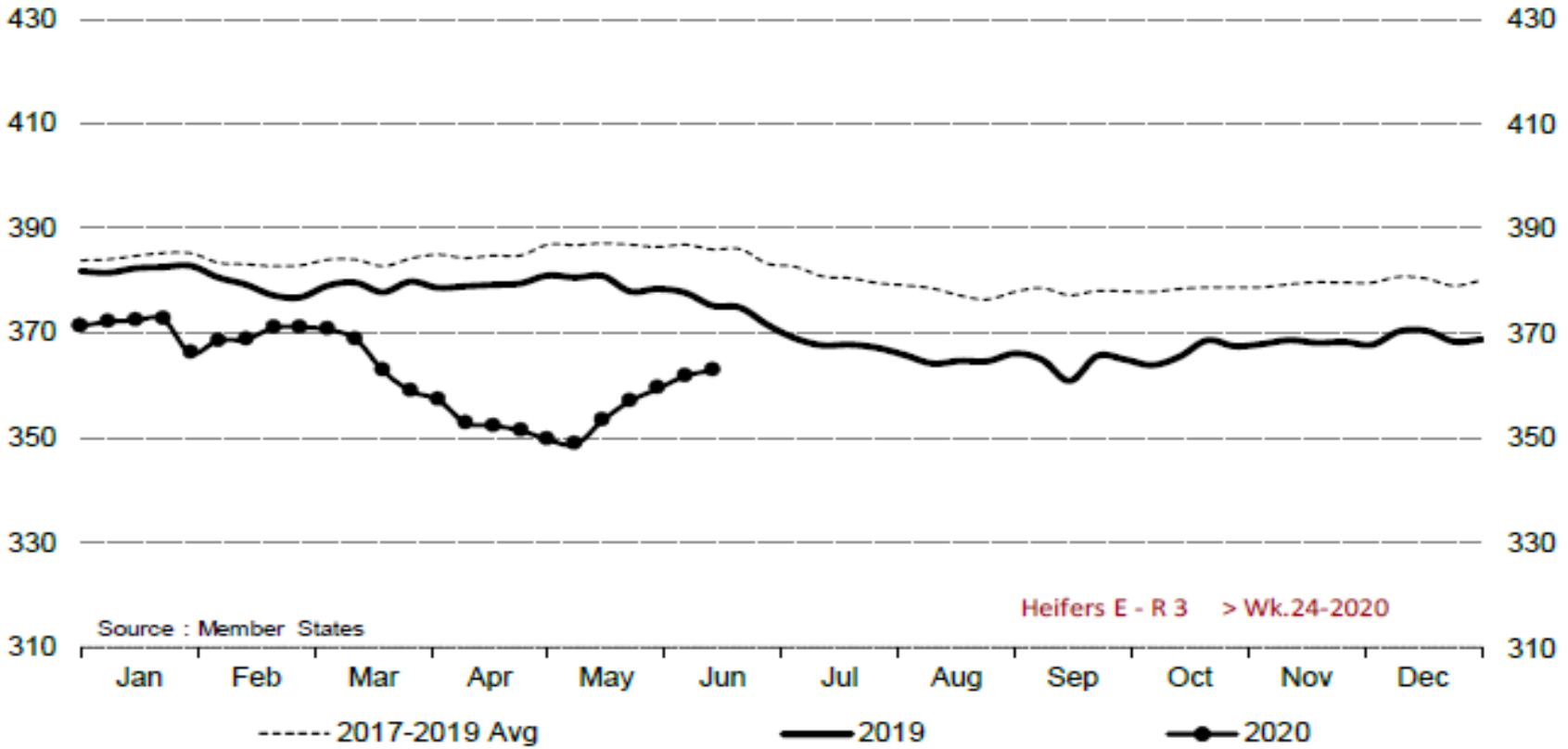
Cows D - O 3 > Wk.24-2020



Price in week 24 : 272.68	Average price in May 2020 : 259.56
% change y/y : - 7.4%	% change y/y : - 12.6%



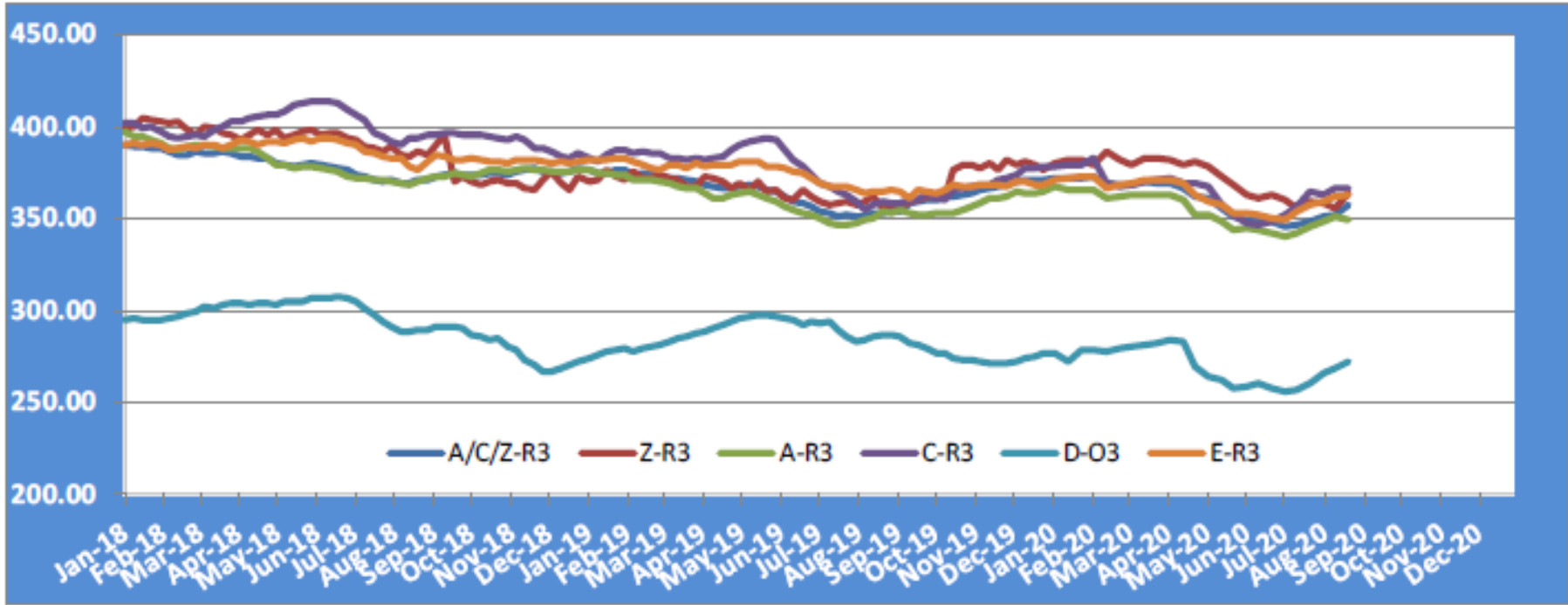
Heifers E - R 3 > Wk.24-2020



Price in week 24 : 363.06	Average price in May 2020 : 354.35
% change y/y : - 3.2%	% change y/y : - 6.7%

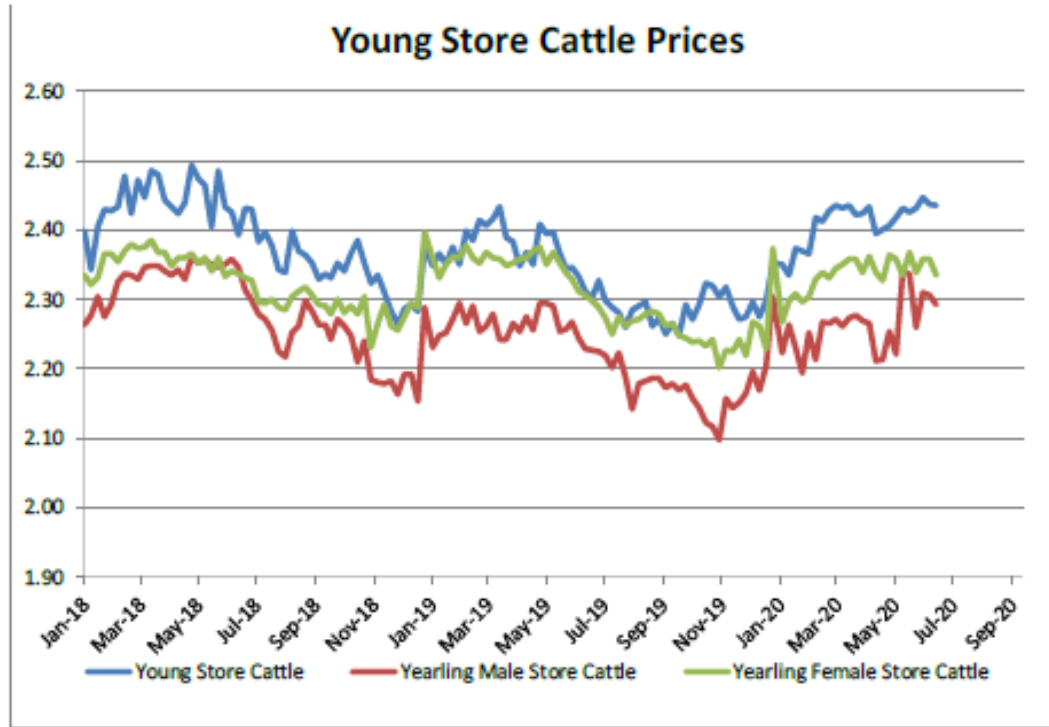
KARKAS FİYATLARI

AB TÜM KATEGORİLERE GLOBAL BAKIŞ



Besilik sığır (€ / 100 kg canlı ağırlık)

Store cattle (€/100 kg live weight)

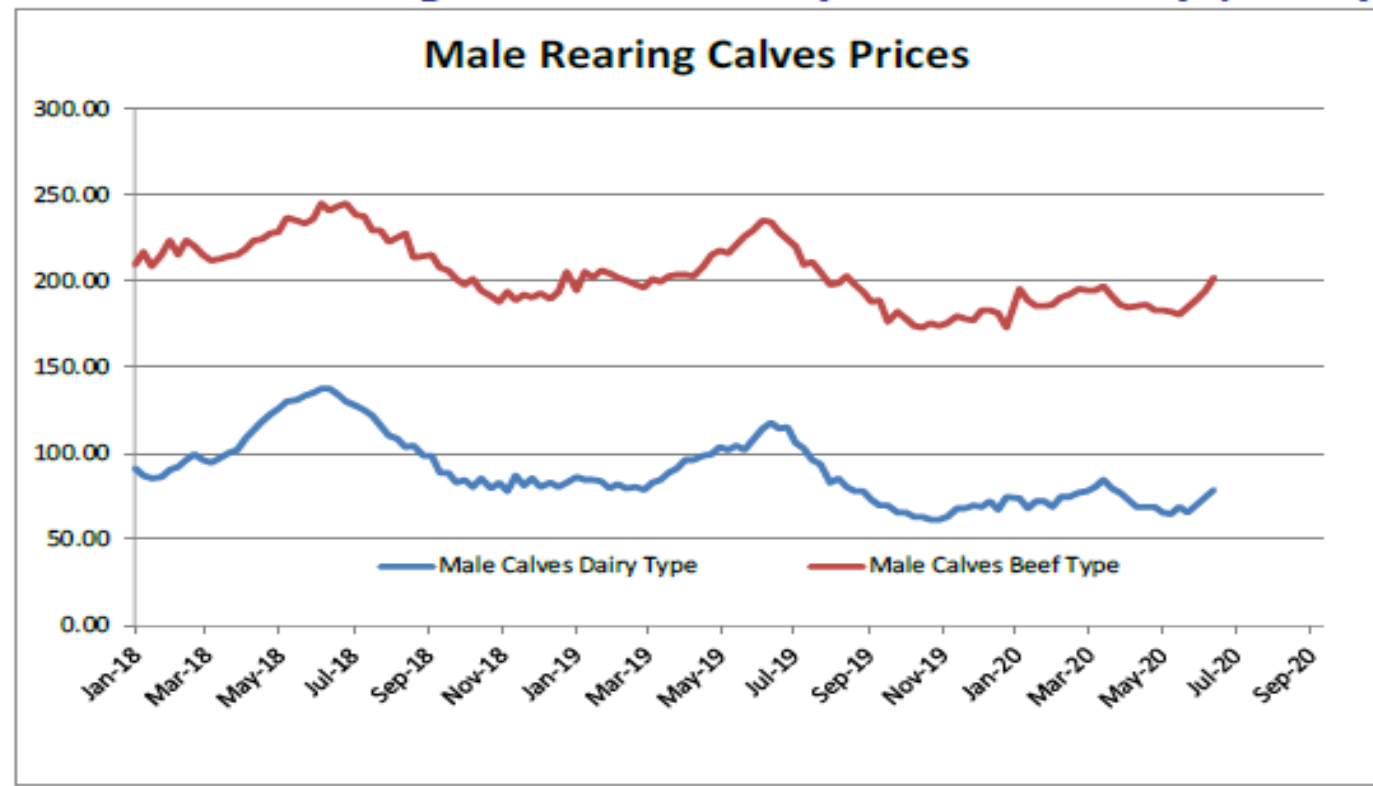


Young Store Cattle Price in	Week 24	2.43	Yearling Male Store Cattle Price	2.29
	Change y/y	+0.90%	Change y/y	+2.87%
Yearling Female Store Cattle Price		2.34		
	Change y/y	-4.07%		



8 gün ve 4 haftalık erkek buzağlar (€ / baş)

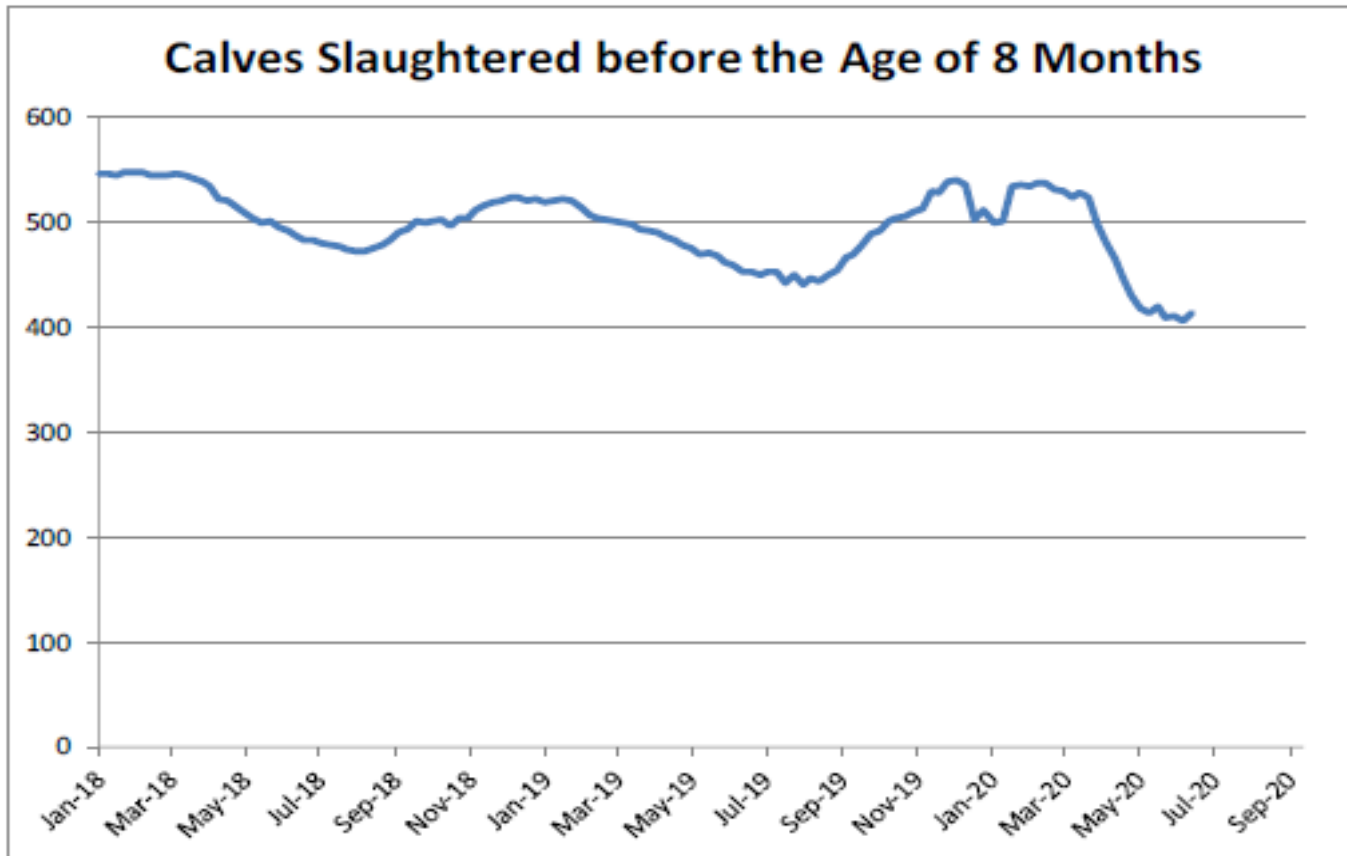
Male calves aged between 8 days and 4 weeks (€/head)



Male Rearing Calves Beef type		Male Rearing Calves Dairy type	
Price in	Week 24	202.23	79.13
Change y/y		-14.15%	-35.61%

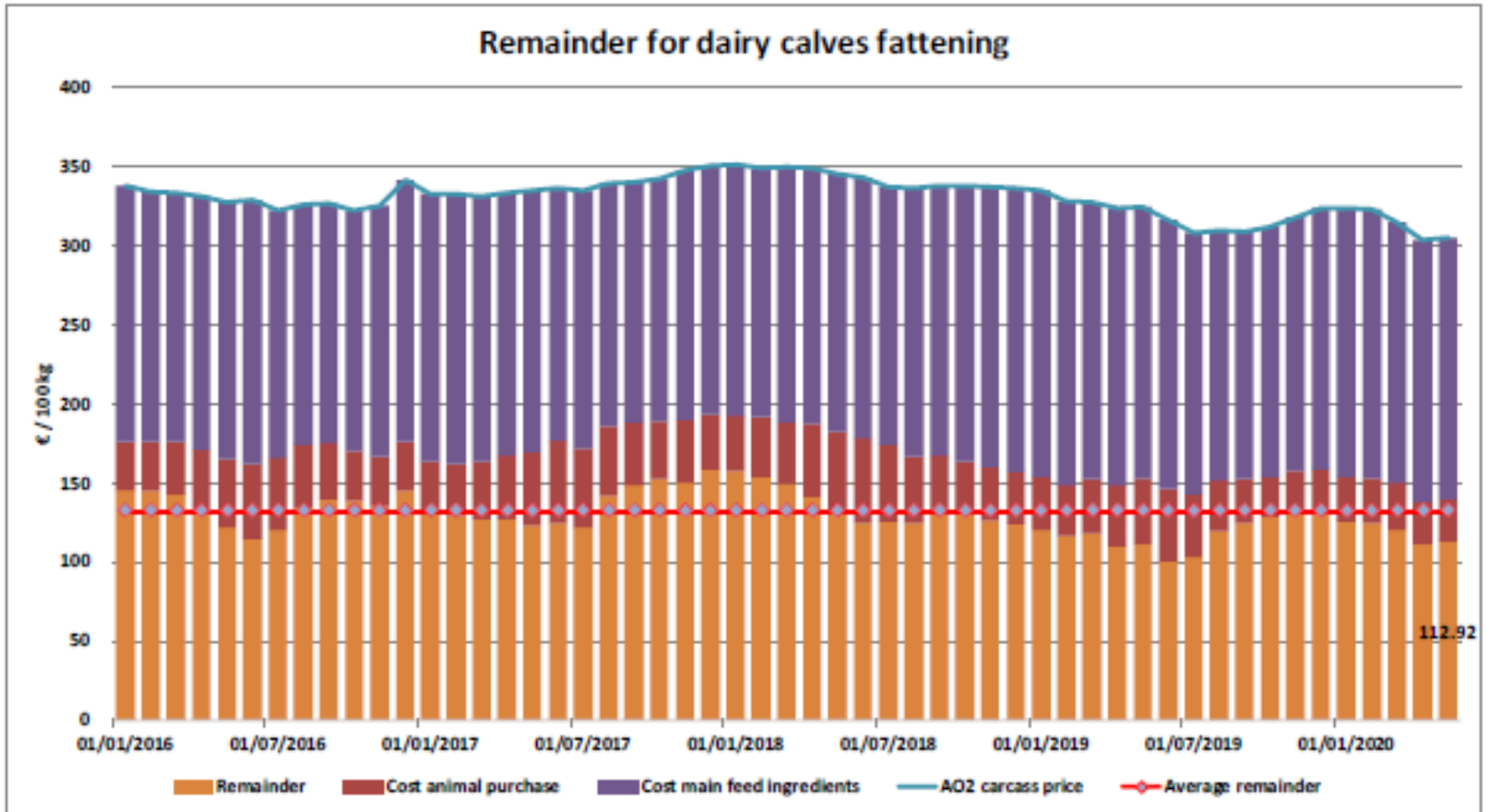
8 aylıktan küçük kesilen buzağlar (€ / 100 kg canlı ağırlık)

Calves slaughtered before the age of less than 8 months

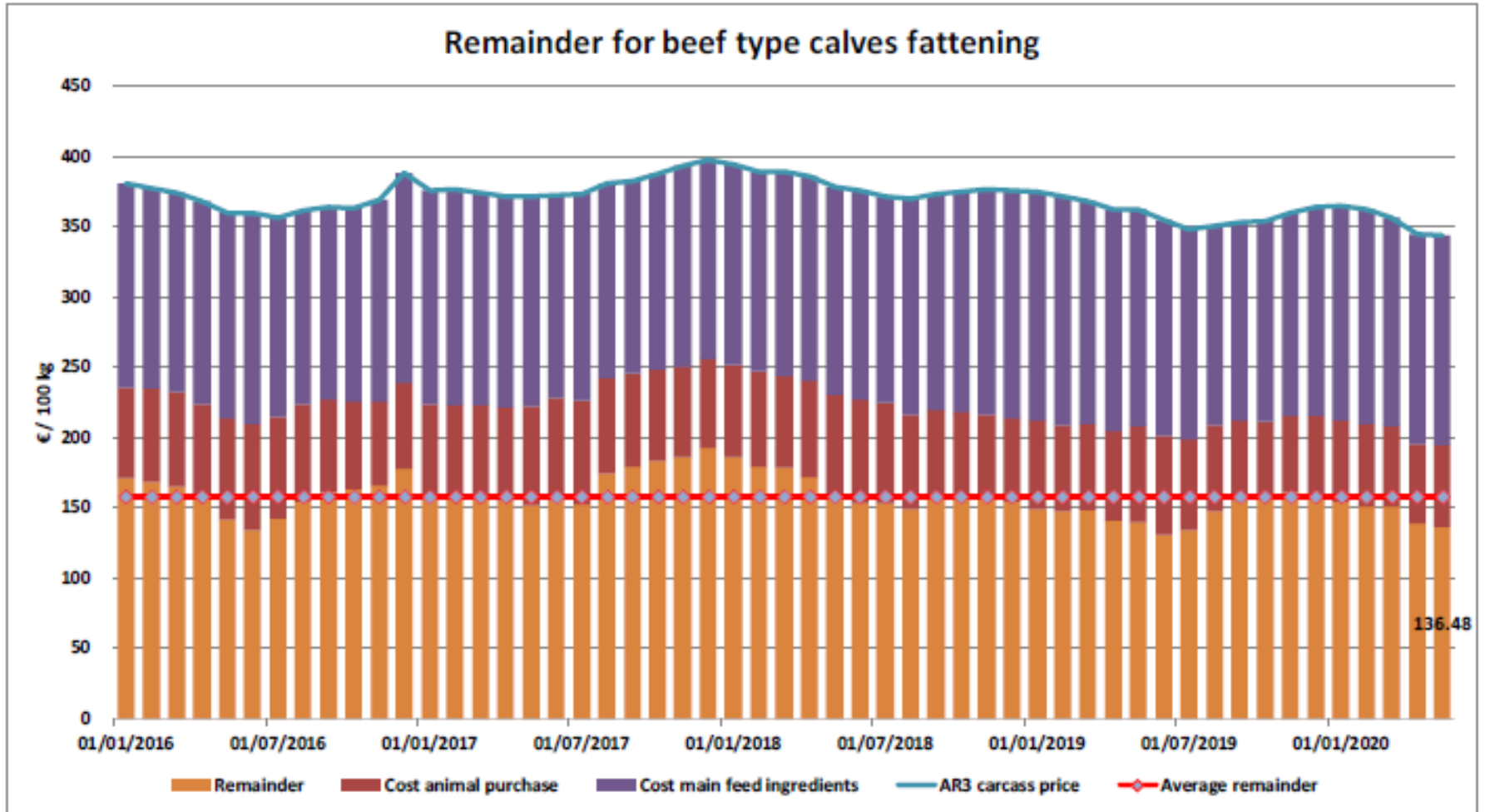


Price in Week 24 414.48 € / 100 kg of carcasse weight
Change y/ -8.61%

Süt Buzağları Besiciliği İçin Kalanlar

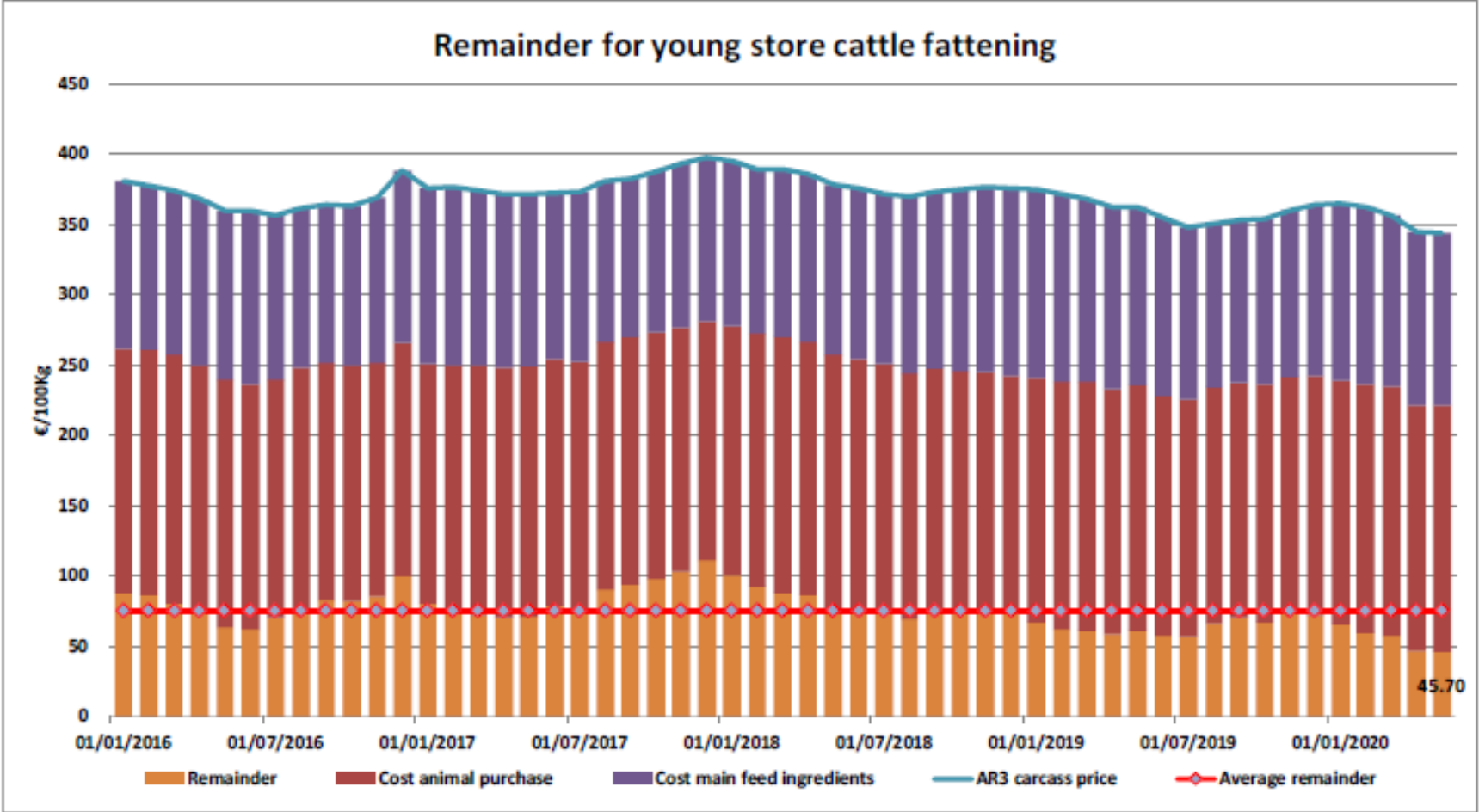


Sığır Tipi Buzağı Besiciliği İçin Kalanlar





Genç Besilik Sığır Besiciliği İçin Kalanlar



AB siğir eti ve canlı hayvan ihracatı (1): Pazar Rakamları (COMEXT – ton ca)

Destinations	2016		2017		2018		2019		Jan-Apr 20		Compared to Jan-Apr 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	477 394	41.5%	493 228	40.4%	486 482	40.9%	439 803	38.6%	119 790	34.4%	- 23.0%
Hong Kong	47 532	4.1%	76 085	6.2%	55 538	4.7%	46 748	4.1%	17 518	5.0%	- 1.1%
Ghana	37 490	3.3%	37 744	3.1%	36 766	3.1%	39 222	3.4%	15 967	4.6%	+ 28.6%
Algeria	25 003	2.2%	26 305	2.2%	35 410	3.0%	57 152	5.0%	15 623	4.5%	- 13.4%
Israel	41 534	3.6%	44 196	3.6%	47 774	4.0%	49 685	4.4%	13 467	3.9%	- 29.1%
Philippines	24 116	2.1%	37 103	3.0%	28 766	2.4%	34 158	3.0%	11 646	3.3%	+ 7.9%
Ivory Coast	35 371	3.1%	36 038	3.0%	36 063	3.0%	33 428	2.9%	11 343	3.3%	+ 17.1%
Lebanon	47 010	4.1%	38 323	3.1%	42 542	3.6%	36 393	3.2%	11 202	3.2%	- 9.3%
China	10 253	0.9%	5 738	0.5%	6 713	0.6%	22 348	2.0%	10 355	3.0%	+ 128.8%
Bosnia-Herz.	38 875	3.4%	34 710	2.8%	38 762	3.3%	41 145	3.6%	10 269	2.9%	- 16.3%
Switzerland	24 872	2.2%	26 707	2.2%	23 762	2.0%	25 188	2.2%	8 967	2.6%	+ 8.4%
Libya	29 723	2.6%	27 848	2.3%	27 878	2.3%	24 524	2.2%	7 369	2.1%	- 5.9%
Canada	862	0.1%	2 424	0.2%	2 225	0.2%	6 806	0.6%	5 706	1.6%	+++
Japan	3 254	0.3%	4 281	0.4%	3 453	0.3%	8 038	0.7%	5 414	1.6%	+++
Morocco	7 517	0.7%	10 005	0.8%	11 429	1.0%	12 982	1.1%	4 939	1.4%	+ 12.7%
Ukraine	7 875	0.7%	7 331	0.6%	10 466	0.9%	13 835	1.2%	4 894	1.4%	+ 11.0%
Turkey	71 030	6.2%	96 414	7.9%	96 052	8.1%	34 421	3.0%	4 531	1.3%	- 42.7%
Other Destinations	220 712	19.2%	216 270	17.7%	198 284	16.7%	214 278	18.8%	69 658	20.0%	
Extra-EU	1 150 422		1 220 750		1 188 364		1 140 154		348 659		
% change			+ 6%		- 3%		- 4%		- 8.2%		

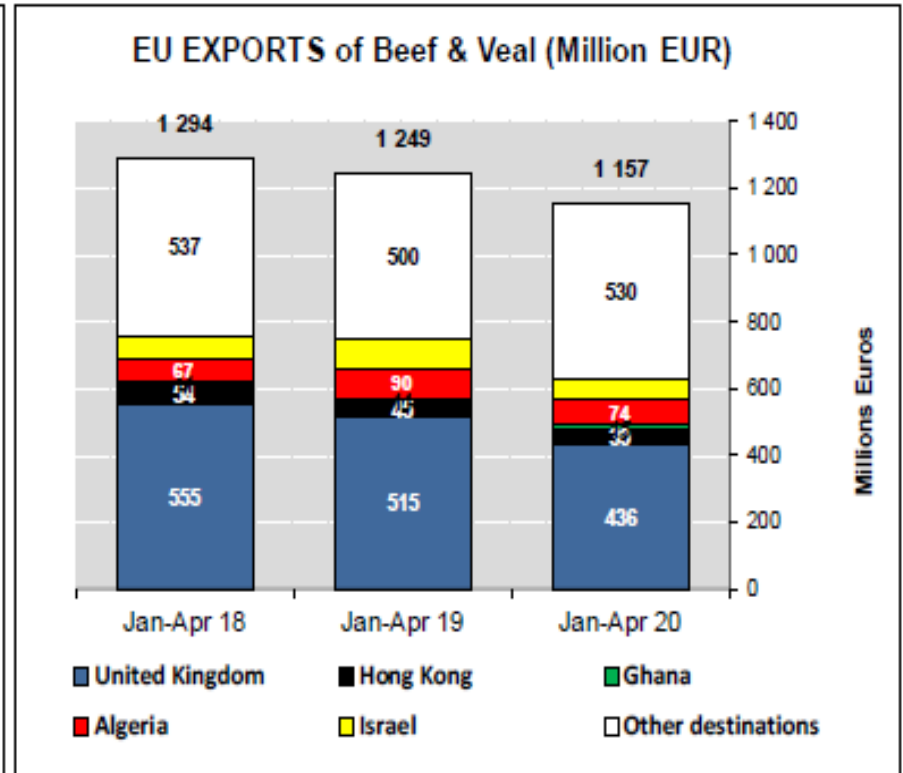
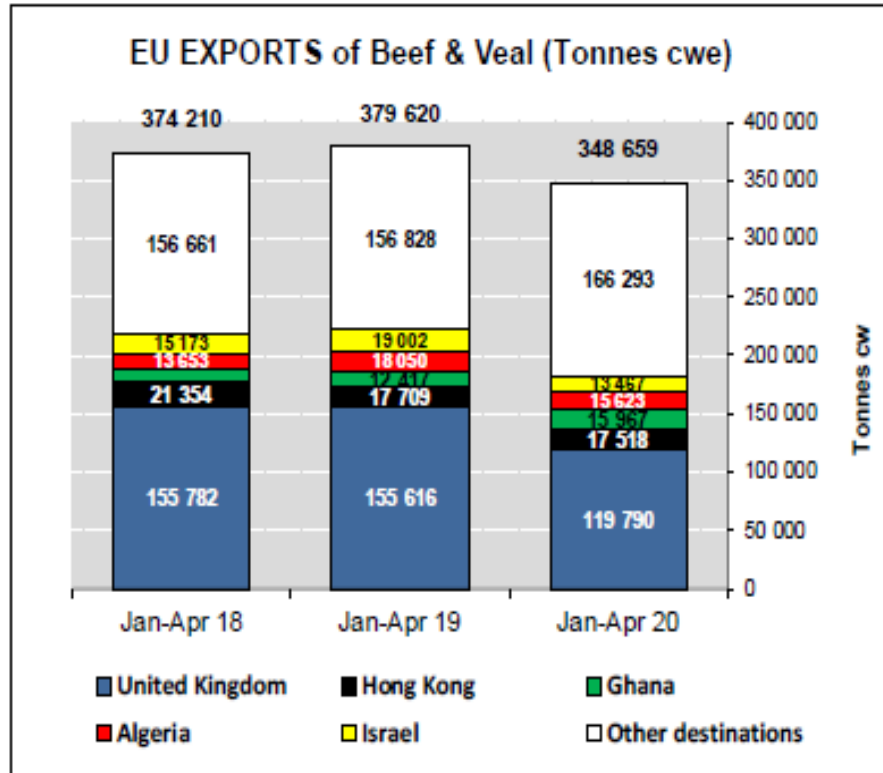


AB sığır eti ihracatı: Pazar Rakamları (COMEXT – ton ca)

Destinations	2016		2017		2018		2019		Jan-Apr 20		Compared to Jan-Apr 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	488 017	50.8%	482 057	49.5%	475 989	50.5%	429 805	47.5%	117 521	41.6%	- 22.7%
Hong Kong	47 532	5.2%	78 085	7.8%	55 538	5.9%	46 748	5.2%	17 518	6.2%	- 1.1%
Ghana	37 490	4.1%	37 744	3.9%	38 788	3.9%	39 222	4.3%	15 987	5.6%	+ 28.6%
Philippines	24 118	2.6%	37 103	3.8%	28 788	3.1%	34 158	3.8%	11 848	4.1%	+ 7.9%
Ivory Coast	35 371	3.8%	36 028	3.7%	38 063	3.8%	33 428	3.7%	11 343	4.0%	+ 17.1%
China	10 253	1.1%	5 738	0.6%	6 713	0.7%	22 348	2.5%	10 355	3.7%	+++
Bosnia-Herz.	36 790	4.0%	32 180	3.3%	38 151	3.8%	38 832	4.3%	9 602	3.4%	- 16.8%
Switzerland	23 704	2.6%	25 589	2.6%	22 712	2.4%	24 110	2.7%	8 524	3.0%	+ 8.2%
Algeria	10 726	1.2%	12 304	1.3%	13 919	1.5%	19 142	2.1%	6 213	2.2%	+ 47.1%
Israel	15 055	1.6%	18 749	1.9%	22 183	2.4%	23 073	2.5%	5 800	2.1%	- 34.9%
Canada	862	0.1%	2 424	0.2%	2 225	0.2%	6 808	0.8%	5 708	2.0%	+++
Japan	3 254	0.4%	4 281	0.4%	3 453	0.4%	8 038	0.9%	5 414	1.9%	+++
Ukraine	7 094	0.8%	6 926	0.7%	9 887	1.0%	12 893	1.4%	4 820	1.7%	+ 10.8%
Norway	18 307	2.0%	12 848	1.3%	7 922	0.8%	7 887	0.8%	3 727	1.3%	+ 5.7%
North Macedonia	11 413	1.2%	11 285	1.2%	10 002	1.1%	11 395	1.3%	3 517	1.2%	+ 12.3%
Angola	13 326	1.4%	10 982	1.1%	11 489	1.2%	8 454	0.9%	3 194	1.1%	+ 34.8%
Chile	2 228	0.2%	8 981	0.9%	16 410	1.7%	12 481	1.4%	3 032	1.1%	- 45.7%
Other Destinations	155 697	16.9%	153 171	15.7%	146 665	15.6%	126 806	14.0%	38 828	13.7%	
Extra-EU	921 234		974 437		942 813		905 185		282 729		
% change			+ 6%		- 3%		- 4%		- 8.9%		

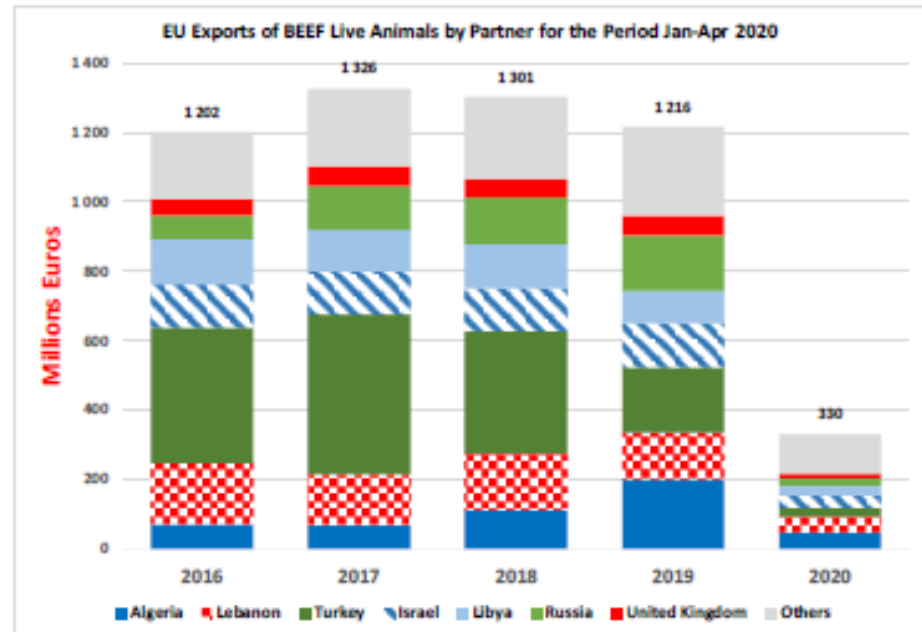
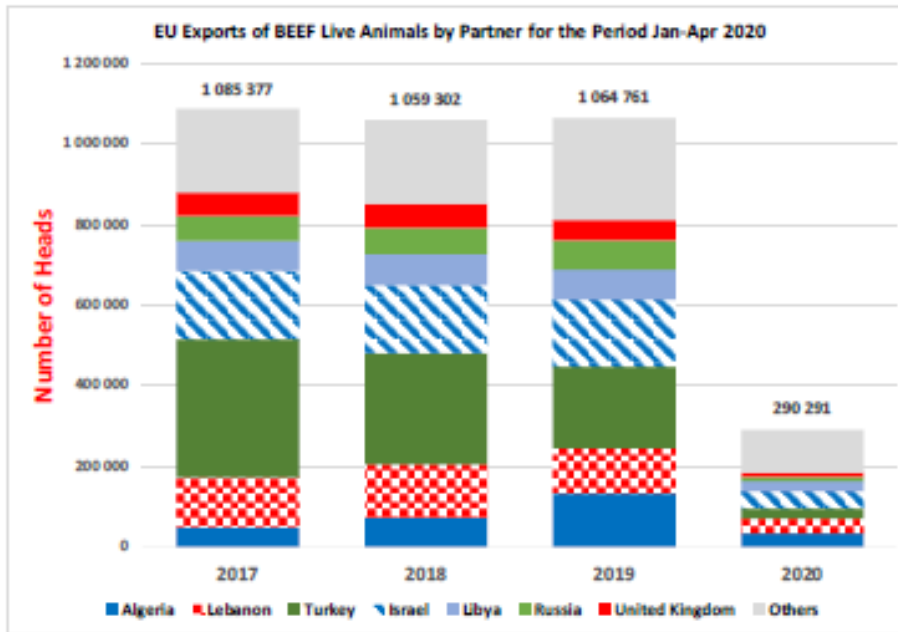


AB Sığır Eti ve Canlı Hayvan İhracat Pazar Rakamları (COMEXT)





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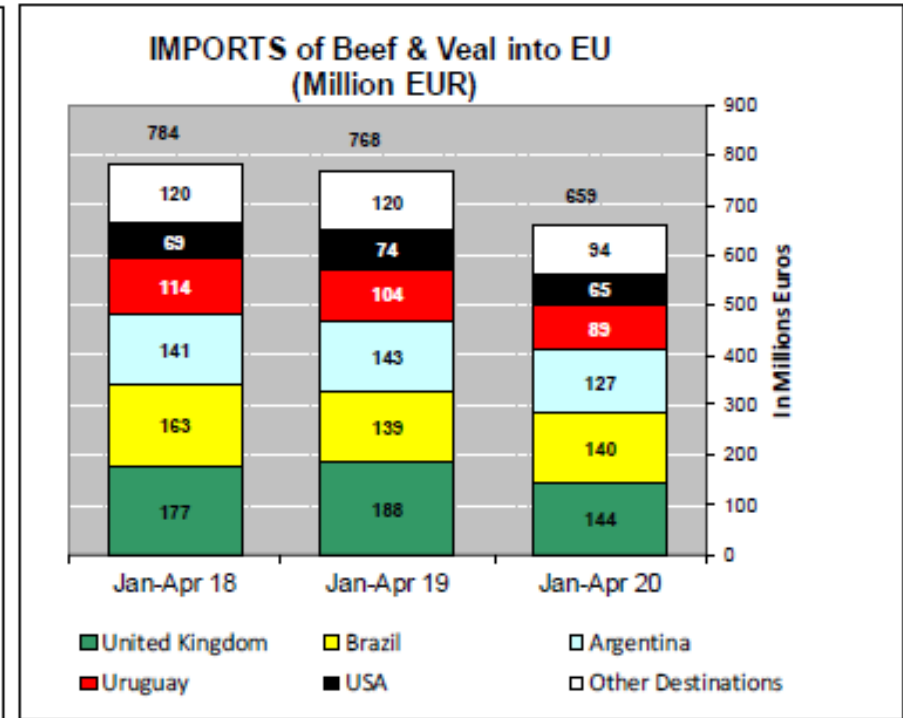
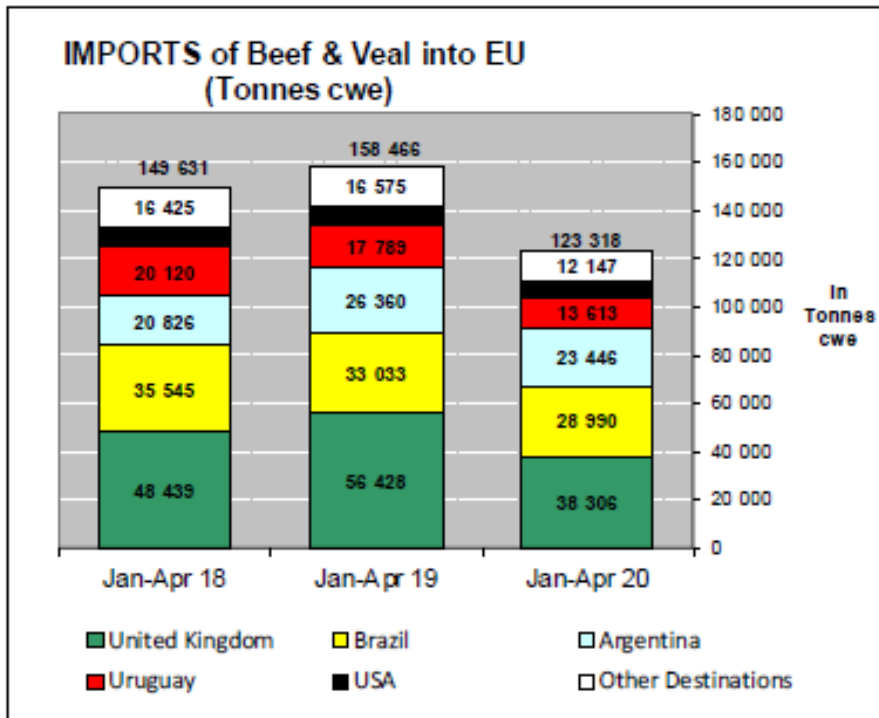


AB Sığır Eti ve Canlı Hayvan İthalatları (1): Ticaret Verileri (COMEXT – ton ca)

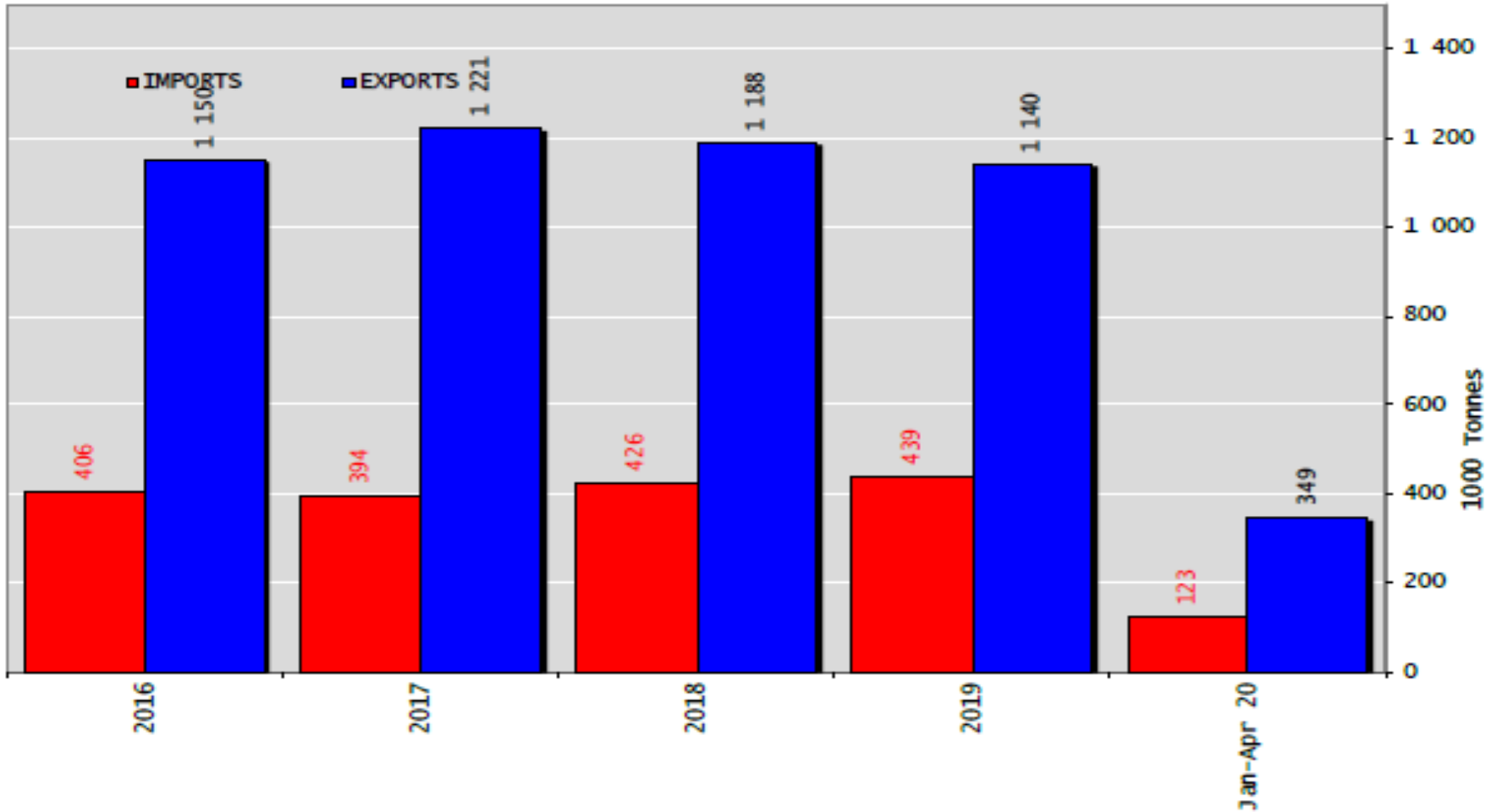
Origins	2016		2017		2018		2019		Jan-Apr 20		Compared to Jan-Apr 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	134 098	33.0%	133 588	33.9%	138 477	32.5%	159 749	36.4%	38 306	31.1%	- 32.1%
Brazil	100 982	24.9%	87 156	22.1%	103 979	24.4%	99 547	22.7%	28 990	23.5%	- 12.2%
Argentina	43 111	10.6%	49 260	12.5%	69 011	16.2%	70 617	16.1%	23 446	19.0%	- 11.1%
Uruguay	52 896	13.0%	55 212	14.0%	48 712	11.4%	40 462	9.2%	13 613	11.0%	- 23.5%
USA	20 290	5.0%	21 624	5.5%	19 268	4.5%	16 852	3.8%	6 816	5.5%	- 17.7%
Australia	21 909	5.4%	18 193	4.6%	17 368	4.1%	16 516	3.8%	5 487	4.4%	- 22.4%
New Zealand	8 274	2.0%	6 806	1.7%	7 164	1.7%	6 724	1.5%	2 266	1.8%	+ 1.2%
Switzerland	5 496	1.4%	5 138	1.3%	5 437	1.3%	4 432	1.0%	1 420	1.2%	- 10.2%
Paraguay	5 309	1.3%	5 922	1.5%	5 520	1.3%	5 204	1.2%	1 260	1.0%	- 28.4%
Serbia	557	0.1%	565	0.1%	1 134	0.3%	1 062	0.2%	392	0.3%	+ 37.7%
Namibia	6 281	1.5%	5 043	1.3%	3 442	0.8%	7 734	1.8%	313	0.3%	- 74.2%
Botswana	4 204	1.0%	2 686	0.7%	3 119	0.7%	4 950	1.1%	265	0.2%	- 66.7%
Canada	392	0.1%	512	0.1%	1 343	0.3%	2 518	0.6%	207	0.2%	- 75.6%
Japan	518	0.1%	646	0.2%	791	0.2%	998	0.2%	200	0.2%	- 39.5%
Ukraine	317	0.1%	374	0.1%	257	0.1%	410	0.1%	87	0.1%	- 31.7%
Chile	575	0.1%	319	0.1%	356	0.1%	392	0.1%	85	0.1%	- 32.0%
Israel	0	0.0%	20	0.0%	0	0.0%	160	0.0%	67	0.1%	+++
Other Destinations	981	0.2%	1 020	0.3%	888	0.2%	613	0.1%	99	0.1%	
Extra-EU	406 191		394 085		426 265		438 941		123 318		
% change			- 3%		+ 8%		+ 3%		- 22.2%		



AB Sığır Eti ve Canlı Hayvan İthalatları (2): Ticaret Verileri (COMEXT)

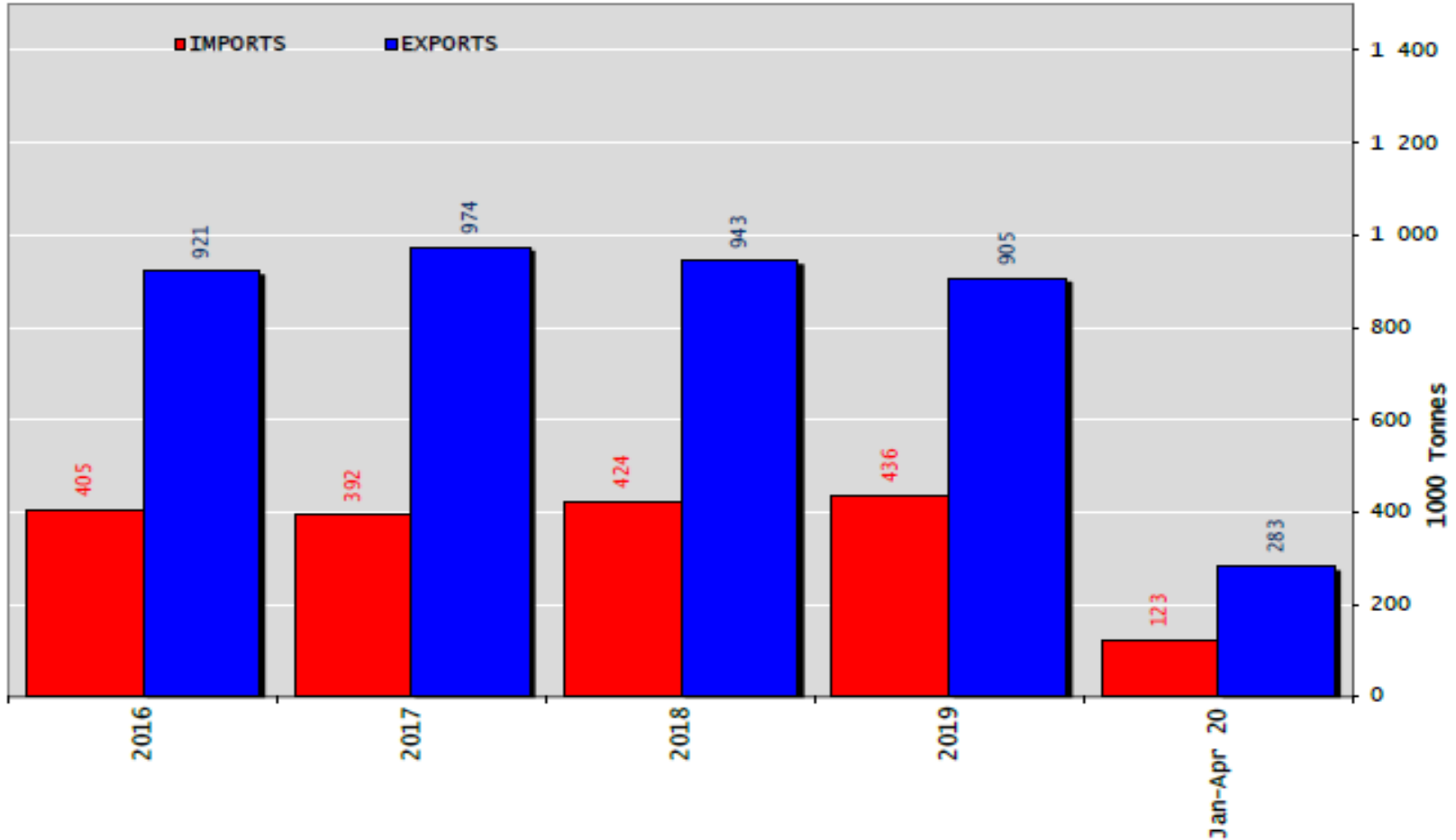


Siğır Eti Ürünleri ve Canlı Hayvan Ticaret Dengesi (Ton)

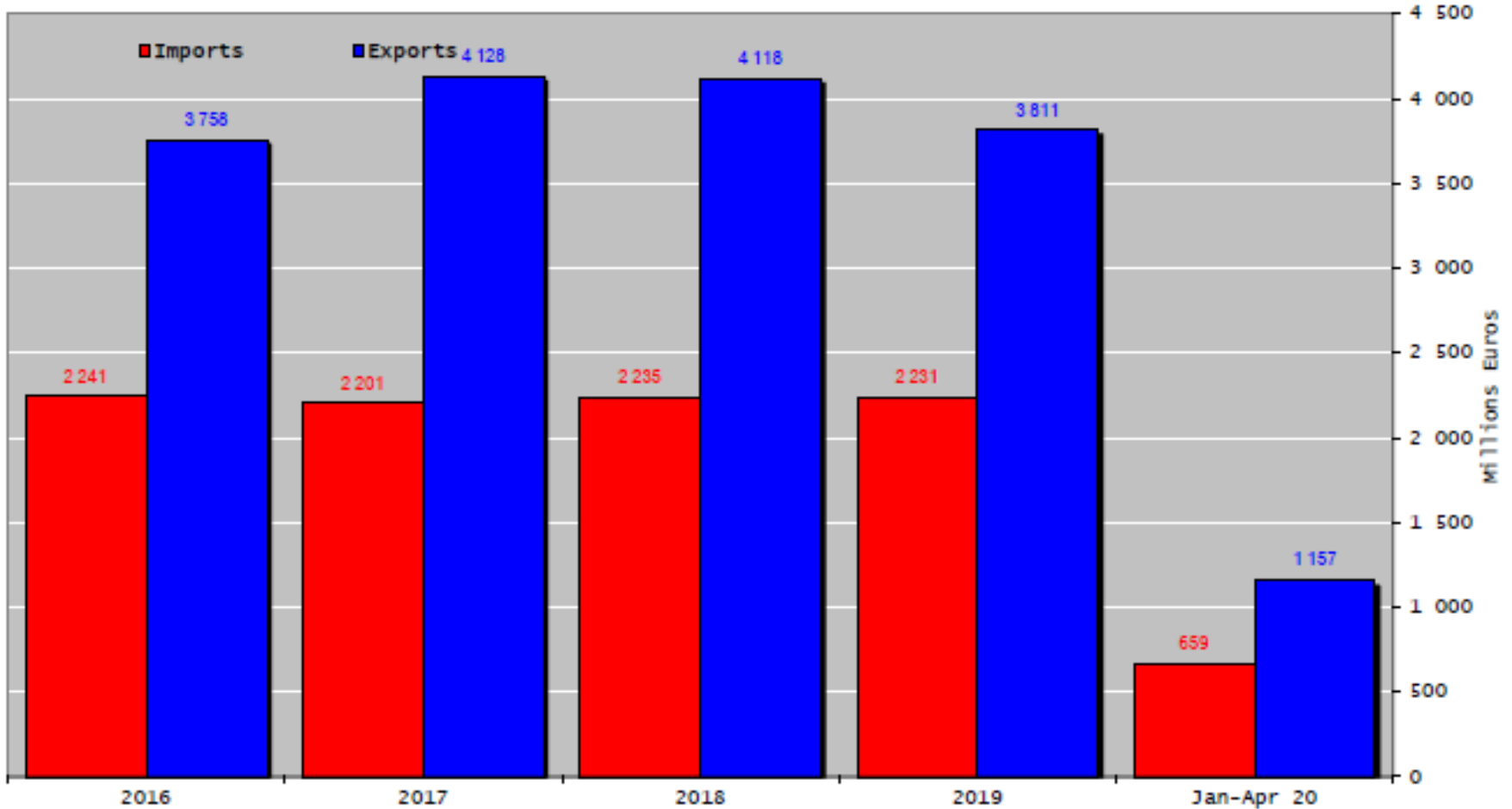




Siğır Eti Ürünleri Ticaret Dengesi (Canlı hayvanlar hariç) (Ton)

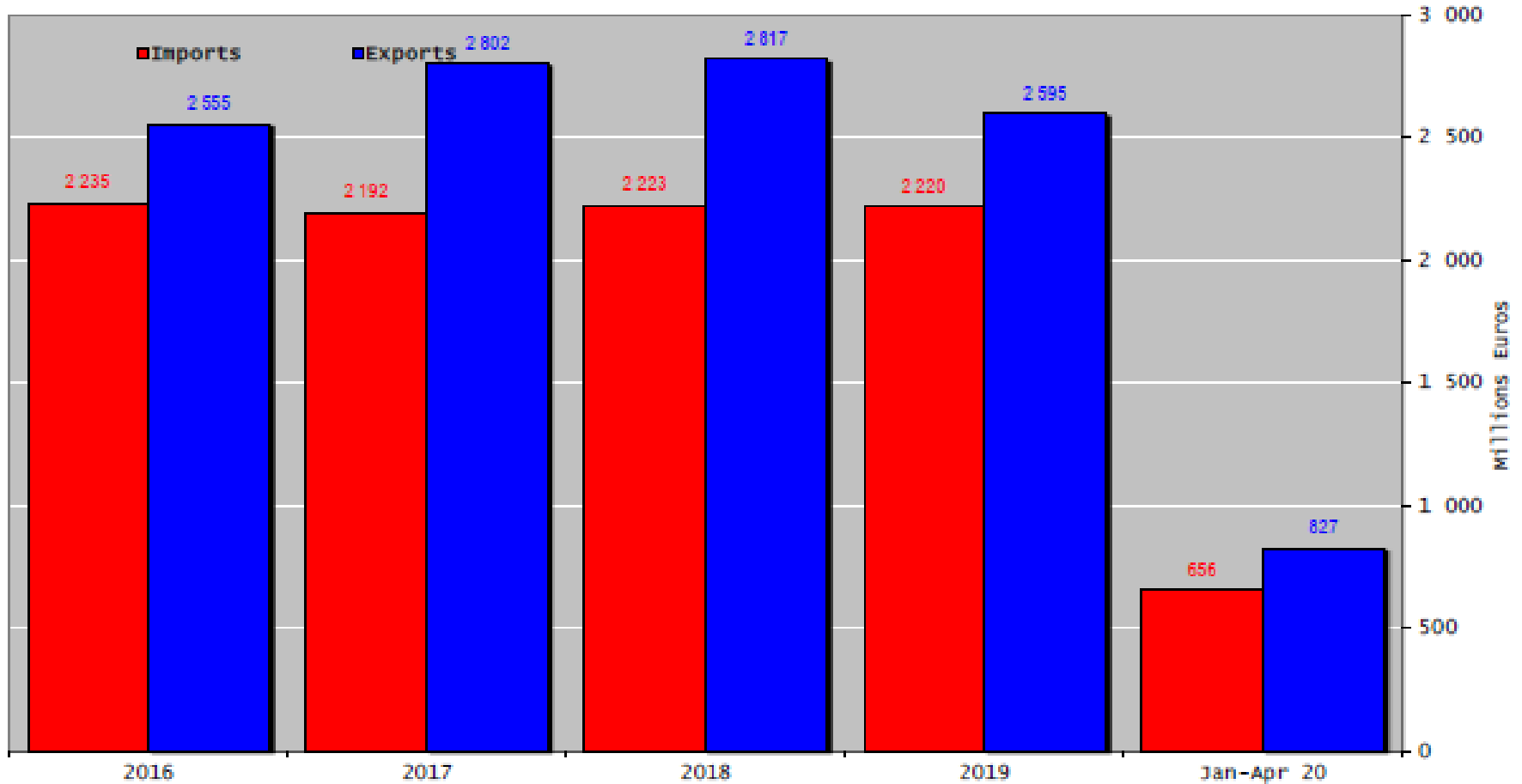


Siğir Eti Ürünleri ve Canlı Hayvan Ticaret Dengesi (Milyon Euro)

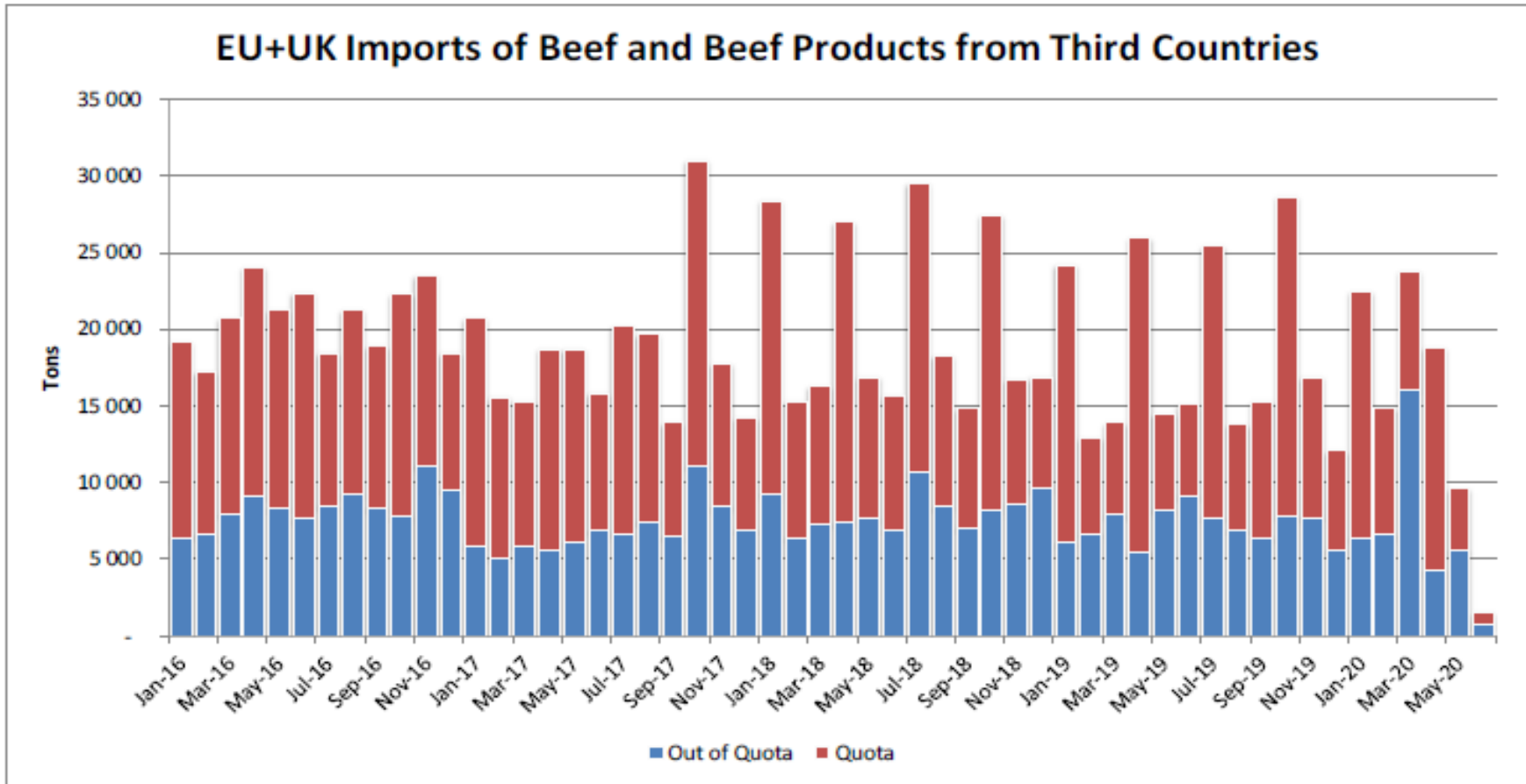




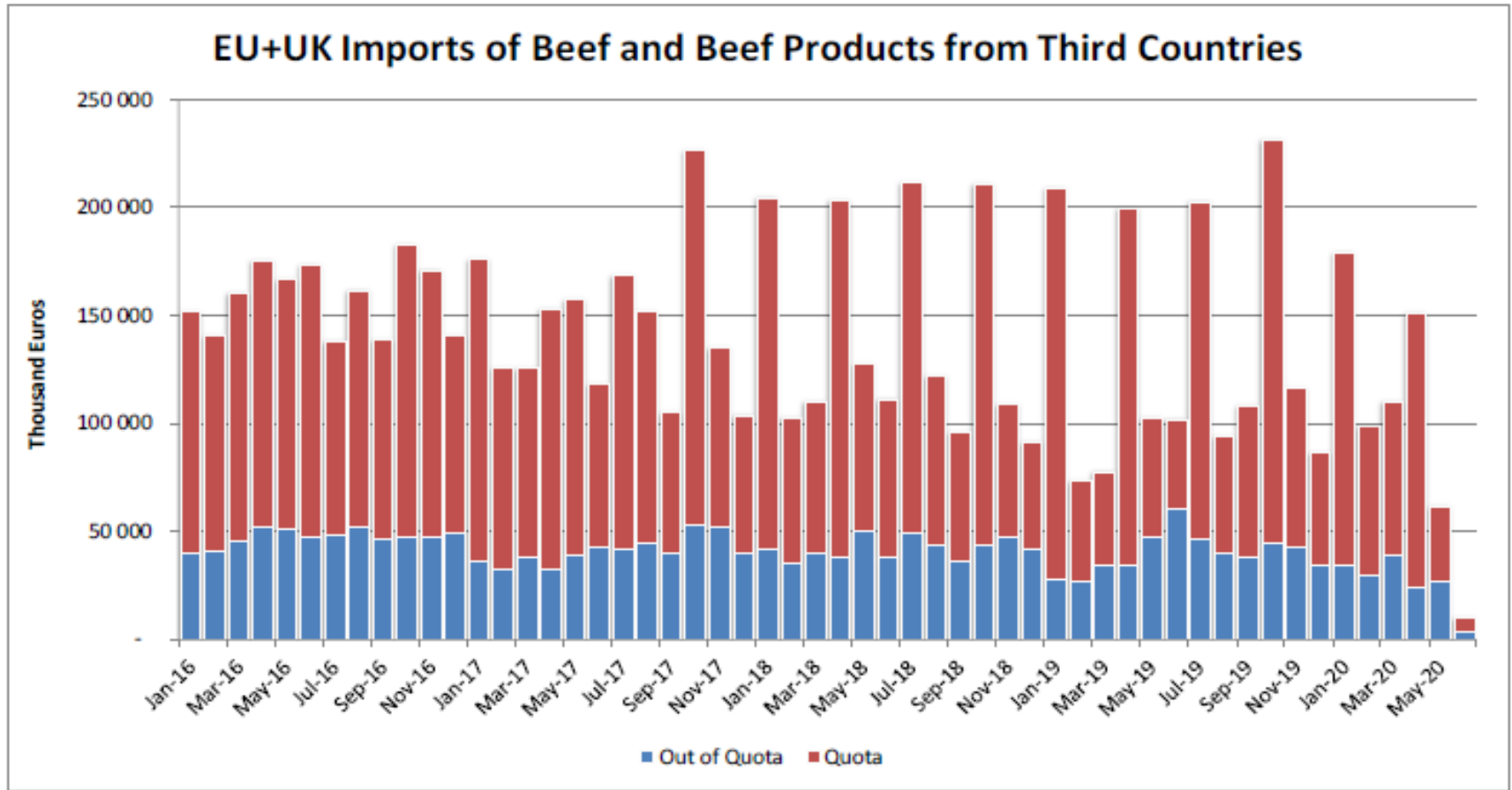
AB Sığır Eti Ürünleri Ticareti (Canlı Hayvanlar Hariç) (Milyon Euro)



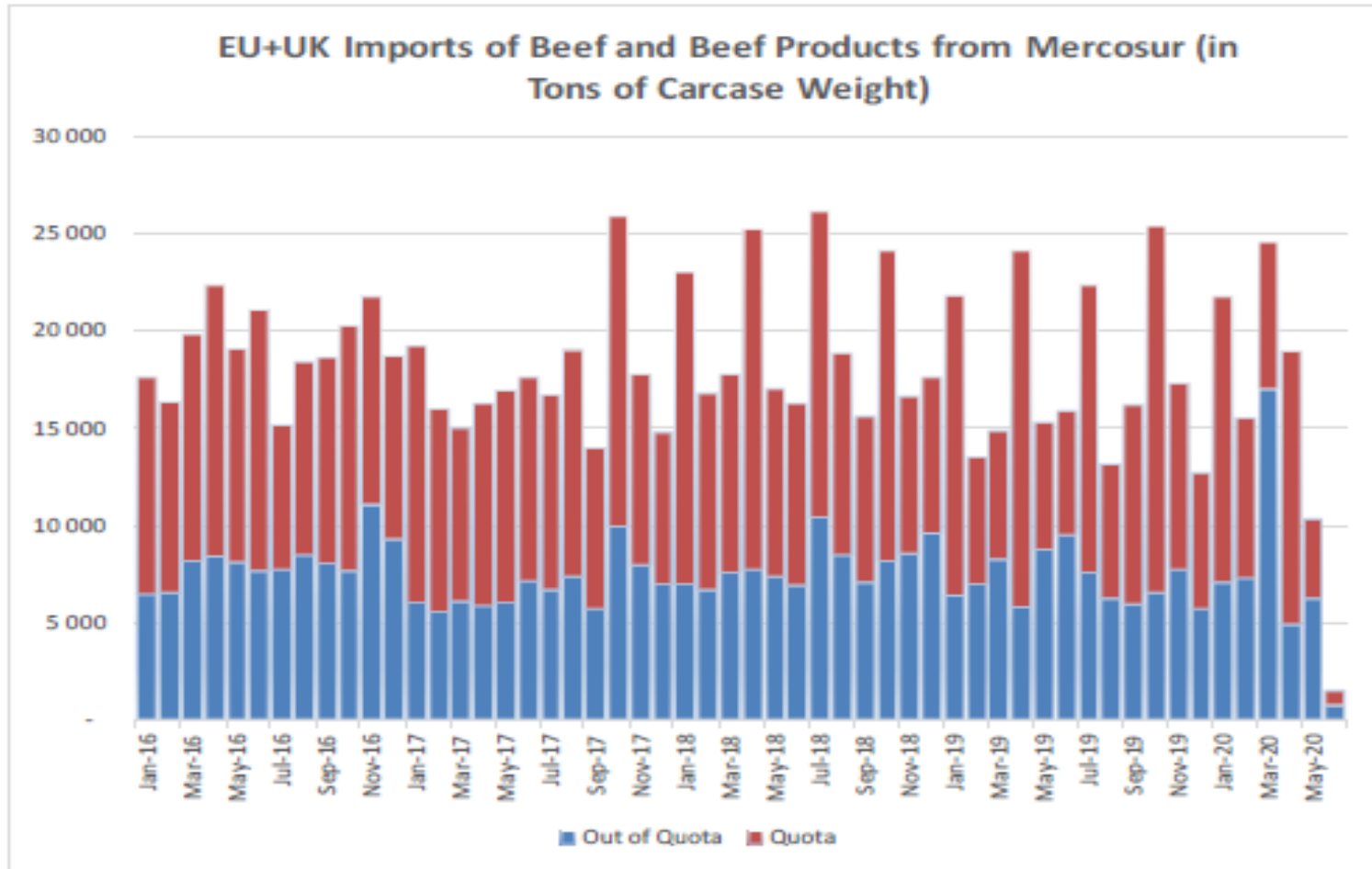
Üçüncü Ülkelerden AB ve Birleşik Krallık Sığır ve Sığır Eti Ürünleri İthalatı (Ton)



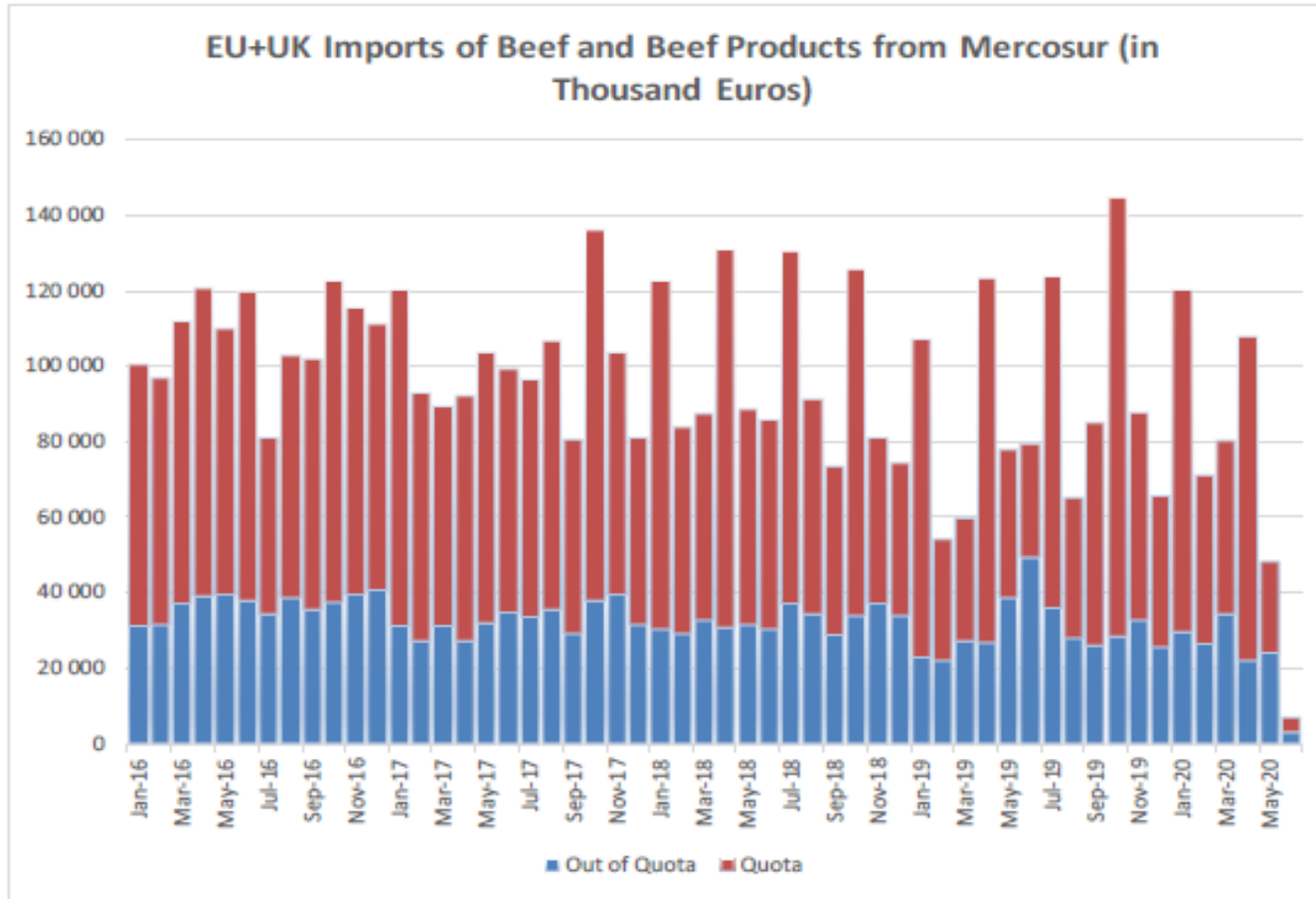
Üçüncü Ülkelerden AB ve Birleşik Krallık Sığır ve Sığır Eti Ürünleri İthalatı (Bin Euro)



Mercosur Ülkelerinden Sığır ve Sığır Eti Ürünleri AB ve Birleşik Krallık İthalatları (Ton, Karkas Ağırlık)



Mercosur Ülkelerinden Sığır ve Sığır Eti Ürünleri AB ve Birleşik Krallık İthalatları (Bin Euro)



YÜKSEK KALİTE SIĞIR ETİ İTHALAT KOTALARI



Hilton Quota

Regulation (EU) N° 593/2013

		Quantity allocated (Tons)	2017/2018		2018/2019		2019/2020*	
			Use		Use		Use	
09.4001	Australia	2 250						
09.4004	Argentina	200	14.67	7.34%	11.05	5.53%	8.34	4.17%
09.4450	Argentina	29 500	28 091.29	95.22%	29 491.35	99.97%	25 572.28	86.69%
09.4451	Australia	7 150	5 333.48	74.59%	4 942.02	69.12%	2 934.48	41.04%
09.4452	Uruguay	6 376	6 363.24	99.80%	6 363.76	99.81%	4 299.24	67.43%
09.4453	Brazil	10 000	5 057.27	50.57%	4 147.19	41.47%	2 826.59	28.27%
09.4454	New Zealand	1 300	1 122.25	86.33%	980.60	75.43%	847.56	65.20%
09.4002	Canada/US	11 500	2 351.37	20.45%	3 883.04	33.77%	2 646.01	23.01%
09.4455	Paraguay	1 000	962.21	96.22%	935.41	93.54%	636.86	63.69%
Total Beef		66 826	49 281.11	73.75%	50 743.37	75.93%	10 810.50	16.18%
Total Buffalo		2 450	14.67	0.60%	11.05	0.45%	-	0.00%
Total		69 276	49 295.78	71.16%	50 754.42	73.26%	10 810.50	15.60%

* up to 30/04/2020

YÜKSEK KALİTE SİĞİR ETİ İTHALAT KOTALARI



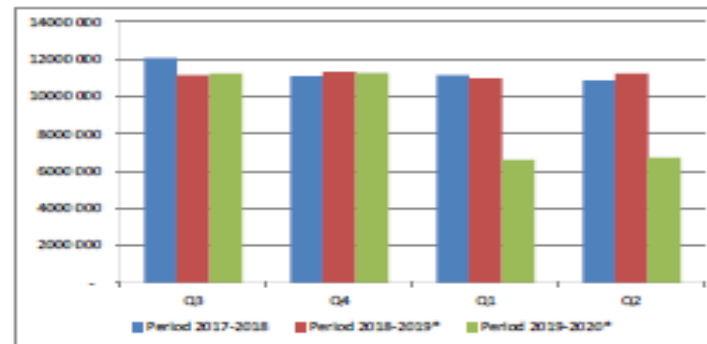
European Commission

Quota erga omnes

Regulation (EU) No 481/2012

	2015-Q3	2015-Q4	2016-Q3	2016-Q2	TOTAL
Period 2015-2016	11 952 185	11 851 187	11 535 011	12 664 673	48 003 056
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	99.19%	98.35%	95.73%	105.10%	99.59%
Available after transfer	12 050 000	12 147 815	12 346 627	12 861 617	
	99.19%	97.56%	93.43%	98.47%	
	2016-Q3	2016-Q4	2017-Q3	2017-Q2	TOTAL
Period 2016-2017	12 059 567	12 062 828	12 015 258	12 095 591	48 233 243
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	100.00%	100.00%	99.71%	100.00%	100.00%
Available after transfer	12 050 000	12 040 433	12 027 606	12 062 348	
	100.00%	100.00%	99.90%	100.00%	
	2017-Q3	2017-Q4	2018-Q3	2018-Q2	TOTAL
Period 2017-2018	12 051 815	11 102 282	11 161 480	10 859 149	45 174 725
Available	12 050 000	11 161 000	11 250 000	11 250 000	45 711 000
Use	100.00%	99.47%	99.21%	96.53%	98.83%
Available after transfer	12 050 000	11 159 185	11 308 718	11 338 520	
	100.00%	99.49%	98.70%	95.77%	
	2018-Q3	2018-Q4	2019-Q3	2019-Q2	TOTAL
Period 2018-2019*	11 164 832	11 319 134	10 972 635	11 255 802	44 712 403
Available	11 250 000	11 250 000	11 250 000	11 250 000	45 000 000
Use	99.24%	100.00%	97.53%	100.00%	99.36%
Available after transfer	11 250 000	11 335 168	11 180 866	11 527 365	
	99.24%	99.86%	98.14%	97.64%	
	2019-Q3	2019-Q4	2020-Q3	2020-Q2	TOTAL
Period 2019-2020*	11 246 417	11 261 455	6 601 249	6 708 044	35 817 165
Available	11 250 000	11 250 000	11 250 000	11 250 000	45 000 000
Use	99.97%	100.00%	58.68%	59.63%	79.59%
Available after transfer	11 250 000	11 250 000	11 250 000	11 250 000	
	99.97%	100.00%	58.68%	59.63%	

* Until 11.06.2020

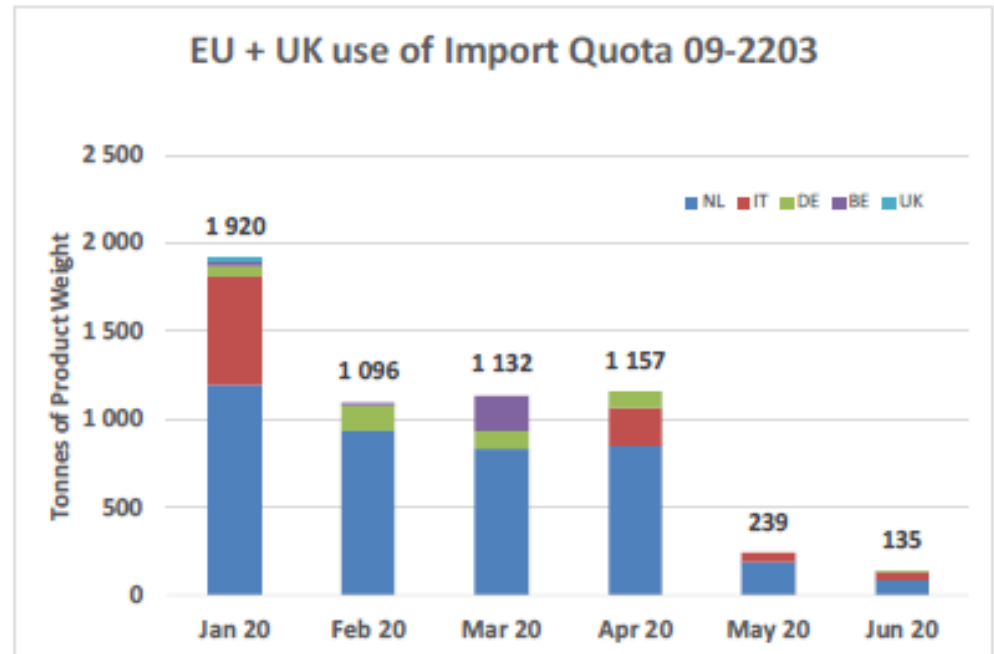


YÜKSEK KALİTE SİĞİR ETİ İTHALAT KOTALARI

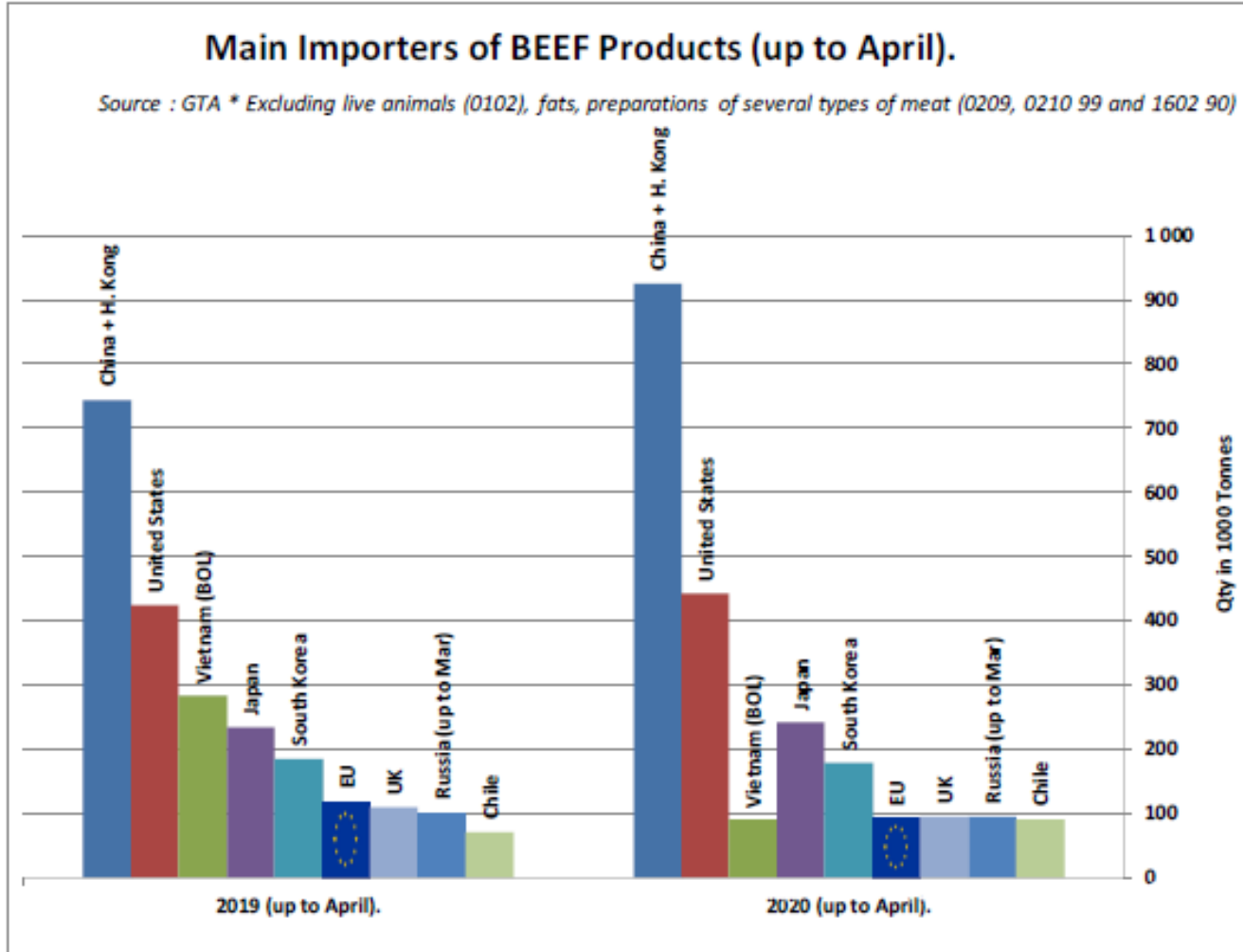


European
Commission

Origin	GATT 2019-2020				Total
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	
NL			2 957	1 122	4 079
IT			614	314	929
DE			313	94	407
BE			241	-	241
UK			23	-	23
Total import within Quota *			4 125	1 530	5 656
Available			4 625	4 625	9 250
Use			89.19%	33.09%	61.14%
After transfer			4 625	5 125	

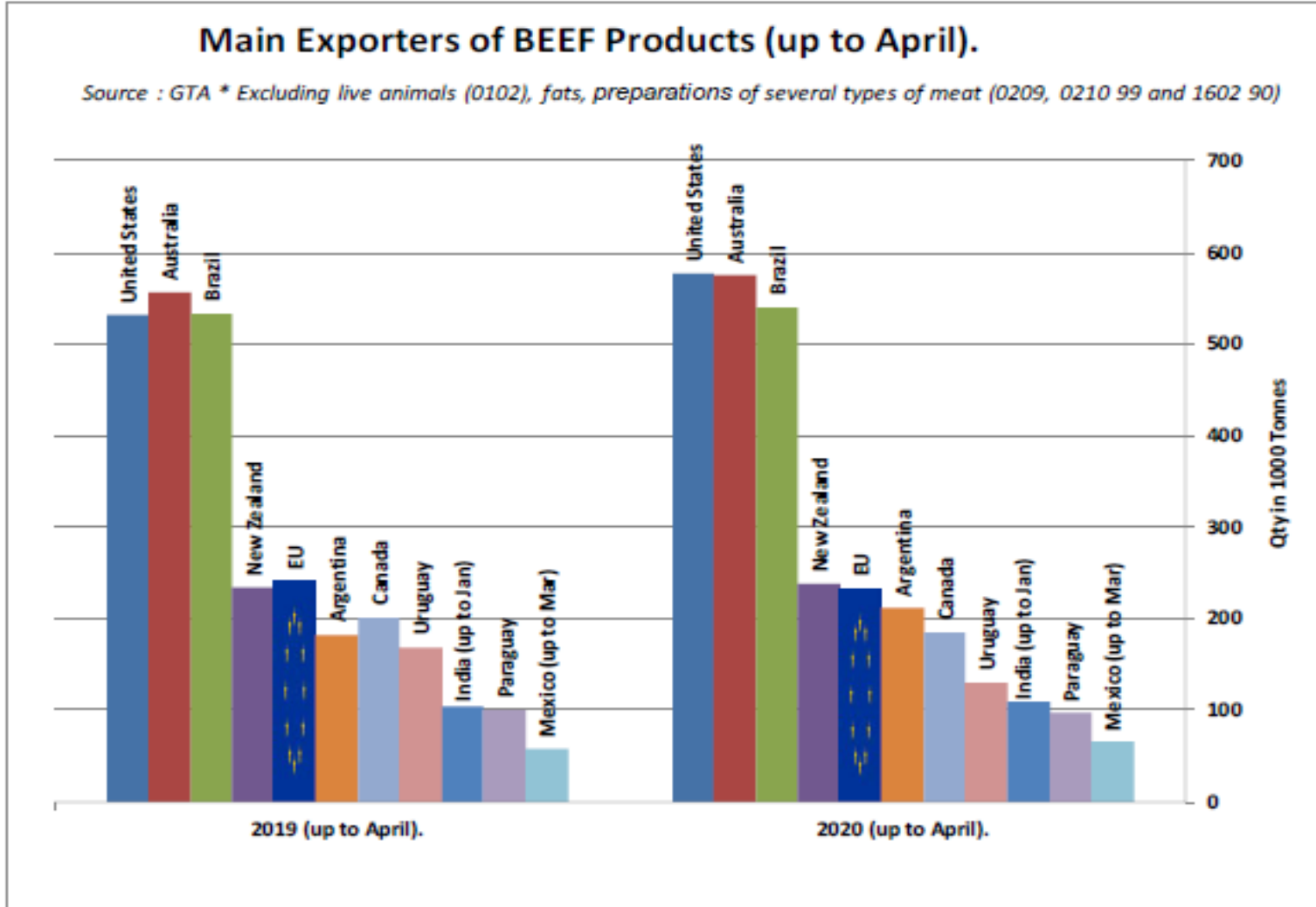


SIĞIR ETİ ÜRÜNLERİNİN NET İTHALATÇILARI (NİSAN AYINA KADAR)





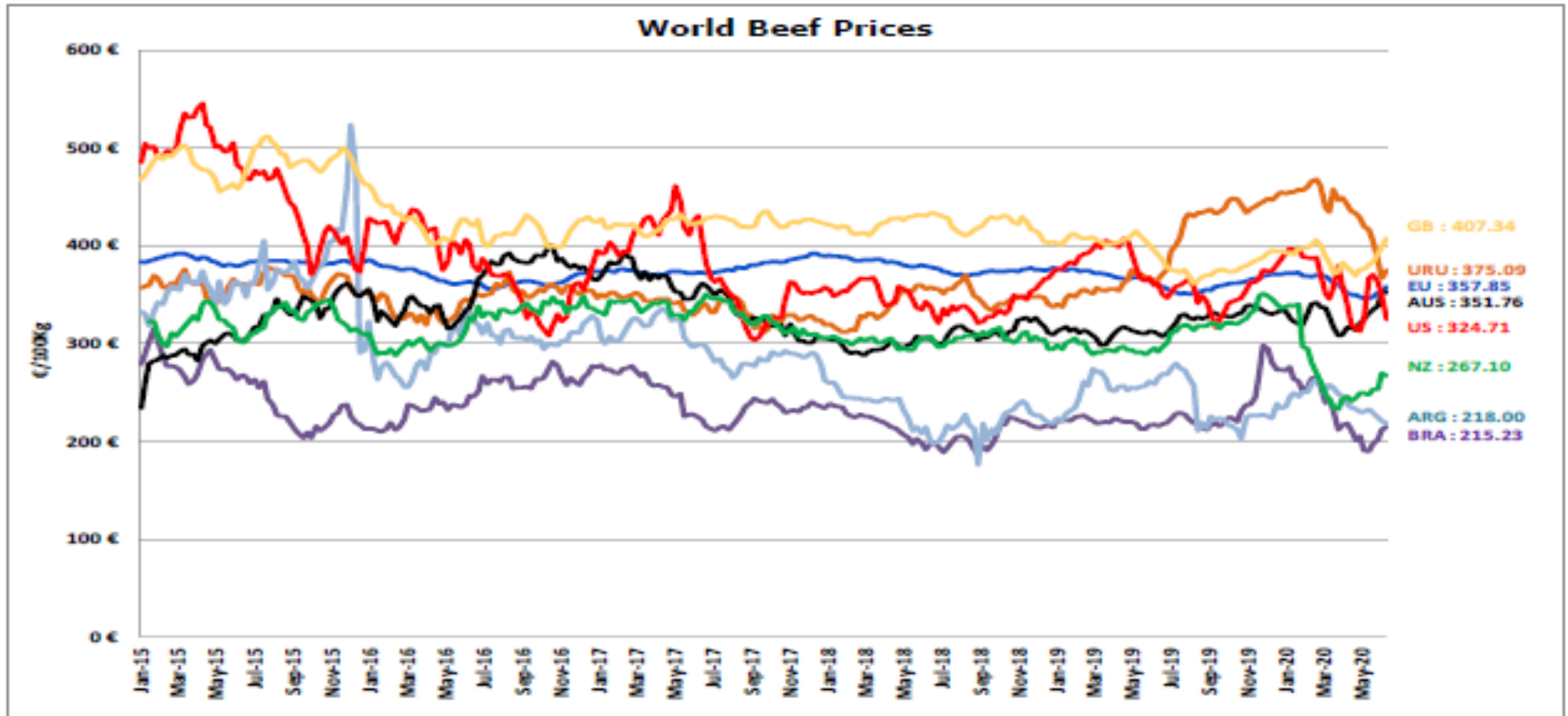
SIĞIR ETİ ÜRÜNLERİNİN NET İHRACATÇILARI (NİSAN AYINA KADAR)



DÜNYA SIĞIR ETİ PAZARI



Dünya Sığır Fiyatları AB, ABD, AVUSTURYA, YENİ ZELANDA



- ECB <http://sdw.ecb.europa.eu/browse.do?node=2018794>
- US <https://www.marketnews.usda.gov/mnp/ls-home>
- AUS <http://statistics.mia.com.au/Report/RunReport/ae59d4ac-74e4-4c56-93bd-982a044d9760>
- UY <http://www.inac.gub.uy/innovaportal/v/11034/10/innova.front/indicadores-y-precios>
- ARG <http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios-comparativos-del-novillo.html>
- BR <http://www.pecuaria.com.br/cotacoes.php>
- NZ <http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios-comparativos-del-novillo.html>



Daha fazla bilgi için:

https://ec.europa.eu/agriculture/market-observatory/meat_en

Ve Agri-FOOD Veri Portalı:

<http://agridata.ec.europa.eu>